

Daily Market Report

14 July 2022

JSE

JSE All-Share index dropped 1.52% to close at 66,142.69 points on Wednesday, as the Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 206.50 points, down by 0.15% on Wednesday, with Sicom Côte d'Ivoire and Sita Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index decreased by 0.32% to close at 51,390.25 points on Wednesday, as the Insurance, Industrial and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index was closed on Wednesday on account of Eid al-Adha.

ESG

Casablanca ESG 10 Index inched up by 0.04% to close at 883.87 points on Wednesday.

African Markets

Nigeria: NSE 30 Index decreased by 0.35% and closed at 1,871.92 points on Wednesday. FCMB and Access were the top losers.

Egypt: EGX 30 Index was closed on Wednesday on account of Eid al-Adha.

Kenya: NSE 20 Index slipped by 0.02% and closed at 1,685.59 points on Wednesday. KCB Group and Total Kenya were the top losers.

South Africa: JSE Top 40 Index dropped by 1.53% to close at 60,031.68 points on Wednesday, as the Industrial, Financial and Resources sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 1.52%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.15%

NSE Nigerian Stock Exchange ▼ 0.32%

EGX Egyptian Stock Exchange ↔ 0.00%

ESG Casablanca Stock Exchange ▲ 0.04%

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.83
INTERBANK RATES	
OPR	13.83 ↔
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.77% to close at 9,160.72 points on Wednesday, as losses in the Telecom, Financials, Industrials, Energy, Utilities, and Basic Materials sectors led shares lower. MSCI UAE decreased by 0.74% to close at 418.02 points.

Vietnam: VN-30 Index decreased by 0.21% to close at 1,216.94 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.28% to close at 771.47 points.

Saudi Arabia: Tadawul All Share Index declined by 1.11% to close at 11,289.75 points on Wednesday, as losses in the Media & Publishing, Petrochemicals and Cement sectors led shares lower. MSCI Saudi Arabia declined by 1.10% to close at 1,567.82 points.

India: Nifty 50 Index decreased by 0.57% to close at 15,966.65 points on Wednesday, as losses in the Power, Oil & Gas and Technology sectors pushed shares lower. MSCI India decreased by 0.42% to close at 1,860.81 points.

News

Nigeria:

Banks borrow ₦595.34bn from CBN in two months
Nigeria Needs Higher Revenue to Avert Debt Distress, DMO Says
Solar Firms Seek Funds as Demand Booms in Power-Deficit Nigeria

Kenya:

Safaricom extends repayment of Sh47bn credit facilities
Government Set to Establish Automotive Council
KO's Passenger Capacity to Europe Slashed by 22%

Abu Dhabi:

UAE and UN agency Unido discuss ways to strengthen industrial collaboration
Healthcare start-up Alliance Care Tech joins Abu Dhabi's Hub71
Dubai's non-oil economy climbs to three-year-high in June

Saudi Arabia:

Saudi point-of-sale transactions plunge in post-Ramadan month
Saudi ports cargo volumes jump 16.1% to 27m tons: Mawani
Saudi Abdullah Al Othaim approves \$226m stake sale in investment firm

Egypt:

Over EGP 1 bln allocated for industrial complexes nationwide: FM
Egypt raises domestic fuel prices in quarterly review
Suez Canal for Tech Settling reports \$27.4 mn profit over 9 month period

South Africa:

South African Reserve Bank is expected to increase the repo rate this month
Power cuts sends manufacturing production in SA on a downward spiral
Consumer pressures remain, but SA's exports keep breaking records

India:

Retail inflation stays near 7%, more rate hikes seen
Banks revise foreign currency deposit rates in response to RBI relaxation
India's manufacturing exports to reach \$1 trillion by FY28: Report

Vietnam:

VinFast signs 4-bn-USD deals with Credit Suisse, Citigroup for EV factory in US
\$748 million raised through G-bond auctions in June
Vietnam bolstering financial cooperation with Germany

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,160.72	-0.8%	-0.7%	-2.3%	7.9%	AED/USD	3.67	0.0%	0.0%
Egypt	8,764.25	0.0%	0.0%	-5.0%	-26.4%	EGP/USD	18.88	0.0%	20.1%
India	15,966.65	-0.6%	-1.6%	1.2%	-8.0%	INR/USD	79.64	0.1%	7.1%
Kenya	1,685.59	-0.02%	-0.4%	4.5%	-11.4%	KES/USD	118.20	0.0%	4.5%
Nigeria	1,871.92	-0.4%	-0.4%	-0.8%	8.7%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,289.75	-1.1%	-1.1%	-2.0%	-0.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,031.68	-1.5%	-3.3%	-0.1%	-10.5%	ZAR/USD	16.89	-0.7%	5.8%
Vietnam	1,216.94	-0.2%	-1.2%	-2.6%	-20.8%	VND/USD	23,393.00	0.0%	2.6%

MSCI Emerging Markets

MSCI Frontier	513.18	-0.2%	-0.5%	-0.8%	-22.9%	Brent Crude (\$)	99.57	0.1%	28.0%
MSCI Frontier 100	1,197.84	-0.3%	-0.6%	-0.3%	-21.9%	Gold (\$)	1,735.50	0.6%	-5.1%
MSCI Emerging	970.46	0.3%	-2.9%	-3.0%	-21.2%	Copper (\$)	7,325.50	-0.4%	-24.6%
MSCI World (USD)	2,544.68	-0.4%	-2.26%	-0.1%	-21.3%	Coffee (\$)	185.91	-2.6%	-6.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	5.80	7.4%	23.4%	52.26	FCMB	3.03	-5.3%	1.7%	12.83
Zenith	22.45	2.0%	-10.2%	78.51	Axamansard	1.90	-5.0%	-14.8%	1.46
FBNH	10.70	0.9%	-7.0%	72.49	Access	9.30	-2.1%	2.2%	72.13
United Capital PLC	12.60	0.4%	27.3%	30.24	UBN	5.45	-1.8%	-9.9%	1.80
					Transnational Corporation	1.23	-0.8%	24.2%	5.28
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Transcorp Hotels	6.25	6.25	0.0%	0.18	Cap	17.00	17.00	0.0%	1.74
Seplat Petroleum	1300.50	1300.50	0.0%	8.29	Nascon	11.00	11.00	0.0%	0.08
Okomu Oil	216.90	216.90	0.0%	0.83	Nestle	1400.00	1390.00	0.7%	47.68
Airtel Africa	1732.20	1767.00	-2.0%	1.14	Access	9.30	9.20	1.1%	71.76
Cadbury	17.10	17.85	-4.2%	5.36	Stanbic IBTC	33.55	32.15	4.4%	2.77

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Bank of Umm Al Qaiwain	2.00	8.1%	8.1%	0.01	Gulf Cement	0.49	-9.1%	-30.1%	0.00
Gfh Financial Group B.S.C	1.06	3.9%	-9.4%	1.44	Sudatel Telecom	0.33	-5.4%	-5.4%	0.01
Abu Dhabi Ports Company	5.21	3.8%	43.9%	32.03	Al Seer Marine Supplies & Eqp. Co	10.12	-2.5%	-27.2%	9.96
Gulf Pharmaceutical Ind.	1.35	3.1%	-26.6%	0.22	Fertiglobe Plc	4.34	-2.5%	23.3%	16.54
Adc Acquisition Corporation Pjsc Shares	11.50	2.1%	5.1%	0.33	Methaq Takaful Ins.	0.71	-2.5%	-12.3%	0.20
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Al Buhaira Ntl Ins.	2.30	2.30	0.0%	0.00	Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00
Insurance House	0.87	0.87	0.0%	0.00	National Bank of Fujairah	4.99	4.98	0.2%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Waha Capital	1.39	1.38	1.0%	0.83
Sharjah Insurance	1.38	1.38	0.0%	0.00	Du	5.80	5.67	2.3%	0.34
National Bank of Umm Al Qaiwain	2.00	2.00	0.0%	0.01	Arkan Building Materials	1.19	1.14	4.4%	1.35

Egypt*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Credit Agricole Egypt	4.44	5.2%	-47.3%	4.06	Medinet Nasr Housing	2.60	-5.1%	-11.0%	121.57
Palm Hills Development Company	1.19	4.3%	-40.1%	4.59	GB AUTO	2.62	-1.1%	-48.6%	10.94
MM Group For Industry And International Trade	2.05	2.5%	-70.2%	14.30	Heliopolis Housing	4.89	-1.0%	-27.1%	11.40
Citadel Capital - Common Shares	1.03	2.5%	-14.6%	3.93	Orascom Development Egypt	3.50	-0.9%	-25.8%	3.11
Commercial International Bank(Egypt)	35.60	2.3%	-32.8%	72.17	Housing & Development Bank	32.37	-0.1%	-72.0%	7.88
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Telecom Egypt	13.22	13.22	0.0%	0.26	Cairo For Investment And RealEstate Dev	10.30	10.30	0.0%	5.62
Sidi Kerir Petrochemicals - SIDPEC	6.94	6.94	0.0%	1.28	Citadel Capital - Common Shares	1.03	1.03	0.0%	3.93
Oriental Weavers	6.45	6.45	0.0%	3.11	Commercial International Bank	35.60	35.60	0.0%	72.17
Misr Fertilizers Production Company - Mopco	94.51	94.51	0.0%	3.65	Credit Agricole Egypt	4.44	4.44	0.0%	4.06
Heliopolis Housing	4.89	4.89	0.0%	11.40	Eastern Company	10.00	10.00	0.0%	2.67

*Market closed on 13/7

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	3784.00	2.6%	-19.1%	1801.866	Indusind Bank	820.50	-3.1%	-7.6%	8873.59
Jsw Steel	587.60	2.3%	-10.4%	2674.63	HDFC	2170.65	-2.5%	-16.1%	7354.10
HUL	2496.95	1.9%	5.8%	6322.28	Bharti Airtel	646.70	-2.5%	-5.4%	7843.67
Cipla	953.05	1.9%	0.9%	1436.22	Hdfc Bank	1359.55	-2.3%	-8.1%	10932.23
Grasim Industries	1402.90	1.7%	-13.5%	655.48	Reliance Industries	2379.00	-1.7%	0.5%	15744.67
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Eicher Motors	2956.85	3053.05	-3.2%	2280.17	Tata Consultancy Svs.	3040.50	3023.85	0.6%	11830.17
Hero Motocorp	2845.00	2954.45	-3.7%	1541.53	Wipro	407.10	402.05	1.3%	2442.41
Mahindra & Mahindra	1140.40	1194.90	-4.6%	3877.32	Hcl Technologies	918.40	905.00	1.5%	11775.39
Bajaj Auto	3854.20	4050.00	-4.8%	1191.17	Tech Mahindra	991.90	943.70	5.1%	2054.80
Maruti Suzuki India	8454.00	9050.00	-6.6%	3492.71	Bharat Petroleum	310.00	293.35	5.7%	1507.31

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	7.26	3.7%	-3.4%	0.09	KCB Group Plc	40.90	-2.4%	-10.0%	4.54
The Cooperative Bank of Kenya Ltd	11.10	1.8%	-14.3%	4.28	Total Kenya Ltd	24.00	-2.0%	-4.0%	0.00
Safaricom Plc	30.00	1.7%	-20.9%	180.97	Equity Group Holdings Plc	44.80	-1.4%	-15.1%	6.30
Absa Bank Kenya	11.45	1.3%	-3.4%	2.34	Standard Chartered Bank Kenya Ltd	132.00	-0.8%	2.9%	1.41
WPP Scangroup Plc	3.30	0.9%	-20.3%	0.37	Centum Investment Company Plc	9.98	-0.2%	-29.2%	0.08
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
Stanbic Holdings	100.00	108.00	-7.4%	0.00	Diamond Trust Bank Limited	50.00	48.00	4.2%	0.45
Bamburi Cement Limited	35.70	40.00	-10.8%	1.47	NCBA Group Plc	24.00	23.00	4.3%	1.26
Standard Chartered Bank Kenya Ltd	132.00	148.75	-11.3%	1.41	Kengen Limited	3.50	3.35	4.5%	1.21
Absa Bank Kenya	11.45	12.95	-11.6%	2.34	British American Tobacco Kenya Ltd	420.75	400.00	5.2%	3.58
Total Kenya Ltd	24.00	27.50	-12.7%	0.00	Kenya Reinsurance Corporation Ltd	2.04	1.92	6.3%	0.14

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Fitaihi Holding Group	31.55	9.9%	-22.6%	27.08	Sahara International Petrochemical Co.	42.70	-9.8%	1.7%	182.03
Bawan Co.	31.20	7.2%	-11.0%	40.61	Saudi Research and Marketing Group	168.40	-6.8%	-14.2%	9.46
Anaam International Holding Group	21.48	6.9%	-73.7%	33.87	Saudi Industrial Investment Group	25.00	-6.5%	-19.7%	38.15
National Metal Manufacturing and Casting Co.	19.62	5.6%	-23.5%	9.12	Methanol Chemicals Co.	30.90	-5.9%	-14.2%	28.14
Naseej International Trading Co	17.20	5.4%	-39.9%	6.74	Advanced Petrochemical Co.	45.05	-5.4%	-36.0%	28.30
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Nahdi Medical Co.	164.20	164.20	0.0%	50.14	Al Kathiri Holding	42.60	42.60	0.0%	0.93
Elm Co.	266.00	266.00	0.0%	102.32	Naseej International Trading Co	17.20	17.20	0.0%	6.74
Saudi Tadawul Group Holding Co.	197.00	197.00	0.0%	51.26	Allied Cooperative Insurance Group	14.34	14.34	0.0%	0.94
ACWA POWER Co.	146.20	146.20	0.0%	62.45	Gulf General Coop Insurance Co.	8.74	8.74	0.0%	2.46
The Saudi National Bank	67.40	67.40	0.0%	364.88	Gulf Union Alahlia	8.99	8.99	0.0%	23.10

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	16100.00	3.6%	-7.5%	50183.01	Naspers Ltd	250294.00	-4.8%	1.3%	403135.78
AngloGold Ashanti Ltd	25330.00	2.5%	-22.9%	41437.63	Sasol Ltd	34759.00	-4.8%	34.2%	80563.40
Cie Financiere Richemont SA	17665.00	0.3%	-26.8%	65971.71	Impala Platinum Holdings Ltd	16325.00	-4.5%	-27.4%	59037.11
MultiChoice Group	12158.00	0.03%	-0.4%	12034.80	Aspen Pharmacare Holdings Ltd	14224.00	-3.8%	-36.6%	17047.73
					Mondi PLC	28926.00	-3.6%	-26.8%	20176.98
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val(mn R)
MultiChoice Group	12158.00	13650.00	-10.9%	12034.80	Mr Price Group Ltd	17243.00	17098.00	0.8%	13667.04
Bidvest Group Ltd/The	21003.00	23636.00	-11.1%	16896.01	SPAR Group Ltd/The	13306.00	13178.00	1.0%	6552.61
Investec PLC	8386.00	9684.15	-13.4%	11525.72	Impala Platinum Holdings Ltd	16325.00	15985.00	2.1%	59037.11
Bid Corp Ltd	30995.00	36098.00	-14.1%	18179.68	Northam Platinum	16449.00	16050.00	2.5%	22504.57
Investec Ltd	8408.00	9830.56	-14.5%	6371.26	Vodacom Group Ltd	13246.00	12762.00	3.8%	14004.16

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	58000.00	3.8%	3.6%	123656.00	Petrovietnam Gas	96300.00	-2.7%	2.8%	86323.32
Vietnam JSC Bank	26550.00	3.3%	-21.7%	102719.30	Phu Nhuan Jewelry	115000.00	-1.5%	20.8%	56281.00
Sai Gon Thuong Tin Commercial	23050.00	2.0%	-26.8%	395323.64	Mobile World Inv. Corp	63600.00	-1.2%	-5.8%	197096.40
Military Commercial Bank	25300.00	1.0%	-12.5%	244253.79	FPT Corp	82500.00	-1.2%	6.5%	94107.75
Ho Chi Minh City Devp	23700.00	0.9%	-23.2%	30404.73	Vietnam National Petroleum Group	39950.00	-1.1%	-25.9%	14537.81
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Phu Nhuan Jewelry	115000.00	130421.95	-11.8%	56281.00	No Va Land Invest	73600.00	72000.00	2.2%	66276.80
Saigon Beer Alcohol Beverage Corp.	153600.00	181400.00	-15.3%	6405.12	Vietcombank	71800.00	68900.00	4.2%	99076.82
Vietjet Aviation	124800.00	149000.00	-16.2%	58968.00	Vinhomes	60100.00	57520.56	4.5%	140309.46
FPT Corp	82500.00	99083.29	-16.7%	94107.75	Vincom Retail	26250.00	25100.00	4.6%	21157.50
BaoViet Holdings	58000.00	70000.00	-17.1%	123656.00	Vietnam Prosperity	27750.00	26500.00	4.7%	292354.58

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