

Daily Market Report

15 July 2022

JSE

JSE All-Share fell by 2.16% to close at 64,712.88 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 207.27 points, up by 0.37% on Thursday, with Sucrivoire Côte d'Ivoire and Ecobank Transnational Inc being the top gainers.

NSE

NSE All-Share Index was down by 0.10% to close at 51,339.01 points on Thursday, as the Consumer goods, Banking and Industrial sectors recorded losses.

EGX

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

ESG

Casablanca ESG 10 Index decreased by 0.59% to close at 878.64 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.16%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.37%
NSE Nigerian Stock Exchange	▼ 0.10%
EGX Egyptian Stock Exchange	↔ 0.00%
ESG Casablanca Stock Exchange	▼ 0.59%

African Markets

Nigeria: NSE 30 Index inched up by 0.02% and closed at 1,872.33 points on Wednesday. FBNH and Guaranty were the top gainers.

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

Kenya: NSE 20 Index increased by 0.51% and closed at 1,694.28 points on Wednesday. Safaricom and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index fell by 2.32% to close at 58,639.21 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.90
INTERBANK RATES	
OPR	13.88 ▲
Overnight	14.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.91% to close at 9,243.95 points on Thursday, as gains in the Telecom, Financials, Real Estate, Industrials, and Utilities sectors led shares higher. MSCI UAE advanced by 1.61% to close at 424.77 points.

Vietnam: VN-30 Index increased by 0.41% to close at 1,221.94 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.73% to close at 777.10 points.

Saudi Arabia: Tadawul All Share Index declined by 1.12% to close at 11,163.02 points on Thursday, as losses in the Industrial Investment, Cement and Retail sectors led shares lower. MSCI Saudi Arabia dropped by 1.16% to close at 1,549.67 points.

India: Nifty 50 Index was down by 0.18% to close at 15,938.65 points on Thursday, as losses in the IT, Technology and Public Sector Undertakings sectors led shares lower. MSCI India slipped by 0.02% to close at 1,860.4 points.

News

Nigeria:

Mutual funds rebound, assets hit \$3.64bn – Report
Fuel queues disappear as marketers dispense above N165
Stakefair Launches, Raises \$670,000 In Pre-Seed Funding

Kenya:

Kenya set to get slice of Sh2.36 trillion Gates cash
Sanctions block Sh13bn Russia exports to Kenya
Family Bank Inks Deal to Increase Lending to Water Enterprises

Abu Dhabi:

UAE and Turkey explore investment opportunities to boost economic relations
Abu Dhabi's Agthia acquires 60% stake in Egyptian snacks maker Auf Group
Crypto exchange OKX receives provisional licence for Dubai

Saudi Arabia:

Saudi June inflation up slightly to 2.3%
Aston Martin to raise over \$589 via Saudi fund, rights issue, report says
Italy's Saipem and Al Hajri Corporation sign deal with Aramco to set up EPC JV

Egypt:

Egypt to spend EGP 55 bn in annual diesel subsidies despite raising fuel prices
Azerbaijan, Egypt discuss implementing joint projects
Rotana grows footprint in Egypt with the upcoming opening of Luxor Rotana

South Africa:

SA Reserve bank to hike repo rate 50 bps on July 21
SA releases draft shale gas regulations
Imperial acquires Nigeria-based Africa FMCG Distribution

India:

Exports up 23.52% to \$40.13 bn in June; trade deficit at record \$26.18 bn
Bharti Airtel allots 1.2% equity shares to Google for Rs 5,224 crore
Tata Steel Long Products posts Rs 331 crore net loss in June quarter

Vietnam:

Added value of industrial sector up 8.48% in H1 2022
Hoa Phat Group's contribution to State budget up 42% in H1
UK hands over national trade repository to Việt Nam

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,243.95	0.9%	0.2%	-1.4%	8.9%	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	15,938.65	-0.2%	-1.7%	1.0%	-8.2%	INR/USD	79.88	0.3%	7.5%
Kenya	1,694.28	0.5%	0.1%	5.0%	-10.9%	KES/USD	118.20	0.0%	4.5%
Nigeria	1,872.33	0.02%	-0.3%	-0.8%	8.7%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,163.02	-1.1%	-2.2%	-3.1%	-1.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	58,639.21	-2.3%	-5.6%	-2.4%	-12.5%	ZAR/USD	17.24	2.1%	8.0%
Vietnam	1,221.94	0.4%	-0.8%	-2.2%	-20.4%	VND/USD	23,420.00	0.1%	2.8%

MSCI Emerging Markets

MSCI Frontier	510.34	-0.6%	-1.1%	-1.4%	-23.3%	Brent Crude (\$)	99.10	-0.5%	27.4%
MSCI Frontier 100	1,191.86	-0.5%	-1.0%	-0.8%	-22.3%	Gold (\$)	1,705.80	-1.7%	-6.7%
MSCI Emerging	965.45	-0.5%	-3.4%	-3.5%	-21.6%	Copper (\$)	7,170.00	-2.1%	-26.2%
MSCI World (USD)	2,544.68	0.0%	-2.3%	-0.1%	-21.3%	Coffee (\$)	187.4	0.8%	-5.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	1.96	3.2%	-12.1%	2.08	International Breweries	5.50	-5.2%	17.0%	42.77
Transnational Corporation	1.26	2.4%	27.3%	15.12	Zenith	22.10	-1.6%	-11.6%	148.27
FBNH	10.90	1.9%	-5.2%	78.78	Access	9.25	-0.5%	1.6%	59.69
Guaranty	20.70	1.5%	-20.4%	123.75	Lafarge Africa	25.90	-0.4%	9.3%	62.53
Sterling	1.55	0.6%	3.3%	9.98					
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%	0.03	Cap	17.00	17.00	0.0%	3.25
Seplat Petroleum	1300.50	1300.50	0.0%	114.82	Nascon	11.00	11.00	0.0%	1.37
Okomu Oil	216.90	216.90	0.0%	8.58	Access	9.25	9.20	0.5%	59.40
Airtel Africa	1732.20	1767.00	-2.0%	0.06	Nestle	1400.00	1390.00	0.7%	7.17
Cadbury	17.10	17.85	-4.2%	1.92	Zenith	22.10	21.25	4.0%	145.61

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement	0.54	10.8%	-22.6%	0.00	Abu Dhabi Natnl for Building Materials	0.17	-8.1%	-31.7%	0.00
Ooredoo	7.50	7.1%	15.4%	0.27	Ghitha Holding P.J.S.C.	76.50	-4.4%	178.2%	48.93
Sudatel Telecom	0.35	5.4%	-0.3%	0.01	RAK Co. for White Cement & Cons.	1.95	-3.9%	14.7%	0.03
PALMS SPORTS	10.50	5.1%	-14.1%	14.36	Eshraq Investments	0.33	-3.2%	-7.3%	2.63
National Bank of Umm Al Qaiwain	2.10	5.0%	13.5%	0.34	ADC ACQ CORP PJSC WARRANTS	1.55	-3.1%	106.7%	0.16
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	National Bank of Fujairah	4.99	4.98	0.2%	0.00
Insurance House	0.87	0.87	0.0%	0.00	Waha Capital	1.41	1.38	2.4%	0.22
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	5.81	5.67	2.5%	0.29
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.18	1.14	3.5%	2.49
National Bank of Umm Al Qaiwain	2.10	2.10	0.0%	0.38	Sharjah Cement	0.61	0.58	5.7%	0.00

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 Intl Bank(Egypt)	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 14/7

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Sun Pharma Industries	882.50	2.6%	4.4%	4323.011	Axis Bank	668.90	-1.6%	-1.4%	5393.76
ONGC	127.25	2.3%	-10.6%	4879.55	Hcl Technologies	903.20	-1.6%	-31.5%	4460.54
Dr Reddys Lab	4586.25	1.9%	-6.5%	4031.10	Hero Motocorp	2801.05	-1.5%	13.8%	1742.11
Kotak Mahindra Bank	1770.70	1.6%	-1.4%	11600.15	Tech Mahindra	976.90	-1.3%	-45.4%	2173.55
Maruti Suzuki India	8561.05	1.4%	15.3%	5170.60	State Bank Of India	480.30	-1.3%	4.3%	4524.06
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	2945.00	3053.05	-3.5%	2662.35	Wipro	402.25	400.50	0.4%	2660.61
Mahindra & Mahindra	1143.00	1194.90	-4.3%	2766.67	Tata Consultancy Svs.	3003.00	2967.00	1.2%	14321.31
Bajaj Auto	3872.65	4050.00	-4.4%	1458.20	Hcl Technologies	903.20	892.30	1.2%	4460.54
Hero Motocorp	2801.05	2954.45	-5.2%	1742.11	Tech Mahindra	976.90	943.70	3.5%	2173.55
Maruti Suzuki India	8561.05	9050.00	-5.4%	5170.60	Bharat Petroleum	306.90	293.35	4.6%	1822.35

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	32.05	6.8%	-15.5%	89.61	Total Kenya Ltd	23.10	-3.8%	-7.6%	0.02
Nairobi Securities Exchange Plc	7.50	3.3%	-0.2%	0.02	Absa Bank Kenya	11.25	-1.7%	-5.1%	1.44
British American Tobacco Kenya Ltd	425.00	1.0%	-3.7%	0.09	KCB Group Plc	40.50	-1.0%	-10.9%	183.50
Kenya Reinsurance Corporation Ltd	2.06	1.0%	-10.4%	0.06	WPP Scangroup Plc	3.27	-0.9%	-21.0%	0.02
Bamburi Cement Limited	35.90	0.6%	-5.5%	0.89	The Cooperative Bank of Kenya Ltd	11.00	-0.9%	-15.1%	13.85
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	49.95	48.00	4.1%	0.13
Bamburi Cement Limited	35.90	40.00	-10.3%	0.89	NCBA Group Plc	23.95	23.00	4.1%	1.69
Standard Chartered Bank Kenya Ltd	131.50	148.75	-11.6%	0.74	Kengen Limited	3.49	3.35	4.2%	0.50
Absa Bank Kenya	11.25	12.95	-13.1%	1.44	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	0.09
Total Kenya Ltd	23.10	27.50	-16.0%	0.02	The Cooperative Bank of Kenya Ltd	11.00	10.30	6.8%	13.85

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	34.70	10.0%	-14.8%	174.82	Saudi Arabian Coop Insurance Co.	20.00	-8.5%	-8.8%	6.29
Al Hammadi Company for Development and Investment	42.00	6.7%	4.2%	39.45	Arabia Insurance Cooperative Co.	19.36	-8.2%	-51.0%	5.95
Almarai Co.	51.90	3.4%	6.5%	27.69	Astra Industrial Group	45.00	-8.2%	13.1%	16.88
Dar Alarkan Real Estate Development Co.	11.04	2.8%	9.7%	163.25	Sahara International Petrochemical Co.	39.30	-8.0%	-6.4%	261.30
Bawan Co.	32.00	2.6%	-8.7%	30.73	Middle East Specialized Cables	12.12	-6.8%	-40.1%	3.58
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.	165.40	165.40	0.0%	41.35	Al Kathiri Holding	41.40	41.40	0.0%	1.43
Elm Co.	260.00	260.00	0.0%	107.18	Naseej International Trading Co	16.30	16.30	0.0%	3.96
Saudi Tadawul Group Holding Co.	193.00	193.00	0.0%	34.48	Allied Cooperative Insurance Group	14.00	14.00	0.0%	1.80
ACWA POWER Co.	148.80	148.80	0.0%	32.50	Anaam International Holding Group	21.30	21.30	0.0%	45.29
The Saudi National Bank	65.70	65.70	0.0%	136.92	Gulf General Coop Insurance Co.	8.47	8.47	0.0%	2.43

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
NEPI Rockcastle PLC	9084.00	0.6%	-14.3%	11154.62	Sibanye Stillwater	3794.00	-8.8%	-22.7%	47794.00
Bid Corp Ltd	31066.00	0.2%	-4.8%	15346.70	Northam Platinum	15033.00	-8.6%	-28.2%	14186.36
Aspen Pharmacare Holdings	14237.00	0.1%	-36.6%	12951.98	Gold Fields Ltd	14955.00	-7.1%	-14.1%	37484.95
					Sasol Ltd	32355.00	-6.9%	24.9%	89877.01
					AngloGold Ashanti	23587.00	-6.9%	-28.2%	38402.37
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)
Bidvest Group Ltd/The	20983.00	23636.00	-11.2%	13668.66	Sibanye Stillwater	3794.00	3794.00	0.0%	47794.00
MultiChoice Group	11975.00	13650.00	-12.3%	9395.38	Mr Price Group Ltd	16643.00	16521.00	0.7%	18007.63
Investec PLC	8384.00	9684.15	-13.4%	11760.77	Sanlam Ltd	5111.00	5065.00	0.9%	23405.77
Bid Corp Ltd	31066.00	36098.00	-13.9%	15346.70	SPAR Group Ltd/The	13062.00	12942.00	0.9%	6407.47
Investec Ltd	8355.00	9830.56	-15.0%	8625.82	Northam Platinum	15033.00	14850.00	1.2%	14186.36

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	36800.00	4.1%	-20.6%	61062.24	Mobile World Inv. Corp	62600.00	-1.6%	-7.3%	133632.22
Saigon Securities Inc	21500.00	3.9%	-53.3%	505144.65	Vincom Retail	26050.00	-0.8%	-13.5%	30244.05
Petrovietnam Gas	98800.00	2.6%	5.5%	68932.76	Vietnam Rubber Group JSC	22200.00	-0.4%	-36.8%	277950.66
Vietnam JSC Bank	27000.00	1.7%	-20.4%	142082.10	Hoa Phat Group JSC	22200.00	-0.4%	-36.8%	277950.66
Vietjet Aviation	126700.00	1.5%	-1.2%	67036.97	Techcombank	35950.00	-0.4%	-28.1%	104326.90
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	115500.00	130421.95	-11.4%	41926.50	No Va Land Invest	73700.00	72000.00	2.4%	96782.84
Saigon Beer Alcohol Beverage Corp.	154900.00	181400.00	-14.6%	3469.76	Vincom Retail	26050.00	25100.00	3.8%	30244.05
Vietjet Aviation	126700.00	149000.00	-15.0%	67036.97	Vinhomes	60100.00	57520.56	4.5%	114568.63
FPT Corp	82800.00	99083.29	-16.4%	73799.64	Vingroup JSC	69500.00	66200.00	5.0%	98293.85
BaoViet Holdings	57900.00	70000.00	-17.3%	42857.58	Vietcombank	72400.00	68900.00	5.1%	23848.56

Email: research@fsdhgroup.com • www.fsdhgroup.com

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