

# Daily Market Report

## 18 July 2022

### JSE

JSE All-Share Index increased by 0.58% to close at 65,088.90 points on Friday, as the Financial and Resources sectors recorded gains.

### BRVM

BRVM Composite Index closed at 207.29 points, up marginally by 0.01% on Friday, with Unilever Côte d'Ivoire and Sicom Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share Index jumped by 1.71% to close at 52,215.12 points on Friday, as the Insurance, Consumer goods, Banking and Oil & Gas sectors recorded gains.

### EGX

EGX 30 Index was up by 0.10% to close at 8,772.93 points on Sunday, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index increased by 0.72% to close at 884.94 points on Friday.

### African Markets

**Nigeria:** NSE 30 Index advanced by 1.24% and closed at 1,895.62 points on Friday. International Breweries and Flour Mills were the top gainers.

**Egypt:** EGX 30 Index was up by 0.10% to close at 8,772.93 points on Sunday, amid Arab and foreign buying.

**Kenya:** NSE 20 Index decreased by 0.70% and closed at 1,682.49 points on Friday. Stanbic Holdings and Absa Bank Kenya were the top losers.

**South Africa:** JSE Top 40 Index increased by 0.45% to close at 58,905.46 points on Friday, as the Financial and Resources sectors recorded gains.

### Capital Markets

#### JSE

Johannesburg Stock Exchange ▲ 0.58%

#### BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.01%

#### NSE

Nigerian Stock Exchange ▲ 1.71%

#### EGX

Egyptian Stock Exchange ▲ 0.10%

#### ESG

Casablanca Stock Exchange ▲ 0.72%

### Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.90
<b>INTERBANK RATES</b>	
OPR	13.83 <span style="color: red;">▼</span>
Overnight	14.00 <span style="color: blue;">↔</span>

### Other Emerging Markets

**Abu Dhabi:** ADX Index inched up by 0.07% to close at 9,249.97 points on Friday, as gains in the Telecom, Health Care, Real Estate, Consumer Discretionary, Energy and Basic Materials sectors led shares higher. MSCI UAE increased by 0.48% to close at 426.82 points.

**Vietnam:** VN-30 Index was down by 0.15% to close at 1,220.14 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.11% to close at 776.28 points.

**Saudi Arabia:** Tadawul All Share Index advanced by 1.16% to close at 11,292.41 points on Sunday, as gains in the Energy, Software & Services and Banking sectors led shares higher. MSCI Saudi Arabia rose by 1.24% to close at 1,568.95 points.

**India:** Nifty 50 Index increased by 0.69% to close at 16,049.20 points on Friday, as gains in the Auto, Consumer Durables and Fast Moving Consumer Goods sectors led shares higher. MSCI India increased by 0.69% to close at 1,873.19 points.

### News

#### Nigeria:

Nigeria's inflation rate hits a 65-month high of 18.6% in June 2022  
At 12.29%, Prime Lending Rate Hits 17-months High  
UBA boosts foreign expansion, begins operations in Dubai

#### Kenya:

Biden dumps Uhuru's trade deal with Trump  
Projects spending hits lowest level in Uhuru presidency  
Safaricom unveils 2nd phase of M-Pesa Merchant Interoperability

#### Abu Dhabi:

Aghia to acquire 60% of Egypt's Auf Group to widen footprint  
Sharjah's property sector gains pace as realty deals reach Dhs1.9b  
Dubai sees Dhs230b realty sales this year

#### Saudi Arabia:

Saudi Arabia, US sign 18 key deals during Biden visit  
Saudi Arabia, Iraq sign electricity interconnection agreement  
Telecom operator Zain KSA's profit more than doubles

#### Egypt:

Parliament approves new law to bypass 65% of fines and interest on tax arrears  
Fitch revises Egypt's real GDP growth up 0.1%, projects 13.2% inflation in 2022  
Egypt's central bank issues LE 35.4B in T-bills, bonds Sunday

#### South Africa:

Yields mixed in SA inflation-linked bond auction  
Anglo American signs emission-reduction tech agreement  
MTN in talks to buy Telkom

#### India:

HDFC Bank net profit up 19% YoY, dips sequentially  
India's forex reserves dip by \$8.06 bn to \$580.25 bn  
Yes Bank sells Rs 48,000 crore bad loans for Rs 11,500 crore

#### Vietnam:

Vietnam enjoys trade surplus of 710 million USD in H1  
Central bank sold greenback to stabilise forex market  
Việt Nam-UK trade expected to reach US\$10 billion

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,249.97	0.1%	0.0%	-1.3%	9.0%	AED/USD	3.67	0.0%	0.0%
Egypt	8,772.93	0.1%	0.1%	-4.9%	-26.3%	EGP/USD	18.88	0.0%	20.2%
India	16,049.20	0.7%	0.0%	1.7%	-7.5%	INR/USD	79.88	0.0%	7.5%
Kenya	1,682.49	-0.7%	0.0%	4.3%	-11.6%	KES/USD	118.25	0.0%	4.5%
Nigeria	1,895.62	1.2%	0.0%	0.4%	10.1%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,292.41	1.2%	1.2%	-2.0%	-0.3%	SAR/USD	3.76	0.0%	0.0%
South Africa	58,905.46	0.5%	0.0%	-2.0%	-12.2%	ZAR/USD	17.08	-0.9%	7.0%
Vietnam	1,220.14	-0.1%	0.0%	-2.3%	-20.5%	VND/USD	23,455.00	0.1%	2.9%

## MSCI Emerging Markets

MSCI Frontier	510.98	0.1%	0.0%	-1.2%	-23.2%	Brent Crude (\$)	101.16	2.1%	30.1%
MSCI Frontier 100	1,193.53	0.1%	0.0%	-0.7%	-22.2%	Gold (\$)	1,703.60	-0.1%	-6.8%
MSCI Emerging	961.85	-0.4%	0.0%	-3.9%	-21.9%	Copper (\$)	7,190.50	0.3%	-26.0%
MSCI World (USD)	2,568.64	1.9%	0.0%	0.9%	-20.5%	Coffee (\$)	181.71	-3.0%	-8.5%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	3.74	10.0%	373.4%	27.01	Stanbic IBTC	31.55	-6.0%	-12.4%	8.55
Airtel Africa	1905.40	10.0%	99.5%	664.21	Dangote Cement	265.00	-3.6%	3.1%	704.66
International Breweries	5.80	5.5%	23.4%	3.42	Sterling	1.52	-1.9%	1.3%	2.46
Flour Mills	33.20	2.2%	17.1%	8.07	Transnational Corporation	1.24	-1.6%	25.3%	16.29
Guaranty	20.95	1.2%	-19.4%	310.02	UBA	7.40	-1.3%	-7.5%	109.43
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%	0.30	Cap	17.00	17.00	0.0%	1.12
Seplat Petroleum	1300.50	1300.50	0.0%	48.17	Nascon	11.00	11.00	0.0%	0.50
Okomu Oil	216.90	216.90	0.0%	1.36	Stanbic IBTC	31.55	31.55	0.0%	8.52
Airtel Africa	1905.40	1905.40	0.0%	667.59	Access	9.20	9.15	0.5%	99.22
Wema	3.74	3.85	-2.9%	29.08	Nestle	1400.00	1390.00	0.7%	12.47

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Aram Group	3.00	11.1%	-3.2%	11.34	National Bank of Umm Al Qaiwain	1.90	-9.5%	2.7%	0.03
Ghitha Holding P.J.S.C.	79.95	4.5%	190.7%	43.62	Sharjah Cement	0.58	-4.6%	-24.1%	0.00
Palms Sports	10.90	3.8%	-10.8%	9.02	Easylease motorcycle rentals	39.00	-3.7%	34.5%	15.25
Adc Acquisition Corporation Pjsc Warrants	1.60	3.2%	113.3%	0.02	Fujairah Cement Industries	0.48	-3.0%	-17.9%	0.00
National Marine Dredging	30.40	1.9%	133.1%	44.62	GFH FINANCIAL GROUP B.S.C	1.00	-2.9%	-14.5%	0.50
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	Sharjah Cement	0.58	0.58	0.9%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Waha Capital	1.40	1.38	1.7%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Du	5.83	5.67	2.8%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Arkan Building Materials	1.18	1.14	3.5%	0.00

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Cleopatra Hospital Company	4.33	3.1%	-12.0%	0.92	Abu Dhabi Islamic Bank- Egypt	10.71	-2.3%	-32.1%	4.08
Medinet Nasr Housing	2.68	3.1%	-8.2%	59.28	Fawry For Banking Techn And E Payment	2.84	-2.1%	-77.8%	9.75
Egyptian Financial Group-Hermes Holding Company	12.30	2.4%	-16.9%	11.36	Orascom Development Egypt	3.43	-2.0%	-42.8%	0.55
ELSWEDY ELECTRIC	6.13	1.3%	-37.6%	11.65	Citadel Capital - Common Shares	1.01	-1.9%	-12.0%	0.92
Commercial International Bank(Egypt)	36.00	1.1%	-32.1%	63.89	GB AUTO	2.57	-1.9%	-26.8%	4.84
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	13.36	13.36	0.0%	0.76	Cairo For Investment And Real Estate Dev	10.30	10.30	0.0%	0.05
Sidi Kerir Petrochemicals - SIDPEC	6.86	6.86	0.0%	2.95	Citadel Capital - Common Shares	1.01	1.01	0.0%	2.38
Oriental Weavers	6.35	6.35	0.0%	1.13	Commercial International Bank	36.00	36.00	0.0%	63.89
Misr Fertilizers ProductionCompany - Mopco	93.00	93.00	0.0%	7.84	Credit Agricole Egypt	4.40	4.40	0.0%	17.45
Heliopolis Housing	4.91	4.91	0.0%	4.84	Eastern Company	9.81	9.81	0.0%	1.58

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Consumer products Ltd.	790.90	3.3%	6.4%	2358.634	Tata Steel	884.05	-2.6%	-20.5%	7242.21
Titan Company	2188.95	2.9%	-13.2%	3787.85	Power Grid Corp Of India	209.20	-2.6%	2.3%	3502.94
HUL	2570.00	2.9%	8.9%	7628.86	Hcl Technologies	882.90	-2.2%	-33.1%	4960.47
Tata Motors	438.80	2.5%	-9.0%	6873.40	Wipro	393.50	-2.0%	-45.0%	4406.28
Larsen & Toubro	1686.00	2.4%	-11.1%	2248.79	Jsw Steel	576.50	-1.3%	-12.1%	1760.64
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	293.80	296.95	-1.1%	3217.66	Hcl Technologies	882.90	877.35	0.6%	4960.47
Mahindra & Mahindra	1167.40	1194.90	-2.3%	4504.87	Wipro	393.50	391.00	0.6%	4406.28
Maruti Suzuki India	8771.15	9050.00	-3.1%	5479.00	Tata Consultancy Svs.	2998.50	2953.00	1.5%	13676.25
Bajaj Auto	3910.10	4050.00	-3.5%	1098.91	Tech Mahindra	975.00	943.70	3.3%	2473.48
Hero Motocorp	2800.00	2954.45	-5.2%	2286.09	Infosys	1434.85	1367.15	5.0%	8007.85

## 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	7.72	2.9%	2.7%	0.51	Stanbic Holdings	90.00	-10.0%	3.2%	0.04
Kenya Reinsurance Corporation Ltd	2.09	1.5%	-9.1%	0.15	Absa Bank Kenya	10.85	-3.6%	-8.4%	2.00
WPP Scangroup Plc	3.30	0.9%	-20.3%	0.09	Safaricom Plc	31.45	-1.9%	-17.1%	81.01
The Cooperative Bank of Kenya Ltd	11.05	0.5%	-14.7%	1.00	Total Kenya Ltd	22.75	-1.5%	-9.0%	0.06
NCBA Group Plc	24.05	0.4%	-4.6%	100.82	Kenya Power & Lighting Limited	1.41	-1.4%	-19.4%	5.12
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)
Bamburi Cement Limited	35.90	40.00	-10.3%	0.49	Diamond Trust Bank Limited	49.95	48.00	4.1%	0.37
Standard Chartered Bank Kenya Ltd	130.75	148.75	-12.1%	2.12	Kengen Limited	3.50	3.35	4.5%	2.34
Absa Bank Kenya	10.85	12.95	-16.2%	2.00	NCBA Group Plc	24.05	23.00	4.6%	100.82
Stanbic Holdings	90.00	108.00	-16.7%	0.04	British American Tobacco Kenya Ltd	423.50	400.00	5.9%	0.42
NCBA Group Plc	24.05	29.00	-17.1%	100.82	The Cooperative Bank of Kenya Ltd	11.05	10.30	7.3%	1.00

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Anaam International Holding Group	23.42	10.0%	-71.3%	101.21	Arabia Insurance Cooperative Co.	17.72	-8.5%	-55.2%	6.38
Saudi Industrial Export Co.	36.35	9.8%	-4.0%	127.55	Fitaihi Holding	32.35	-6.8%	-20.6%	96.40
Wafrah for Industry and Development Co.	34.00	8.8%	-76.5%	19.99	United Cooperative Assurance Co.	26.00	-5.1%	-23.4%	3.05
Al-Baha Investment and Development Co.	15.78	5.9%	-55.3%	18.53	Saudi Arabian Coop Insurance Co.	19.30	-3.5%	-12.0%	1.67
Arab Sea Information System Co.	65.50	5.7%	-66.6%	118.66	National Company for Learning and Education	59.50	-3.4%	-0.8%	20.55
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.	167.80	167.80	0.0%	51.89	Al Kathiri Holding	42.20	42.20	0.0%	0.98
Elm Co.	265.00	265.00	0.0%	33.61	Naseej International Trading Co	16.76	16.76	0.0%	5.26
Saudi Tadawul Group Holding Co.	193.40	193.40	0.0%	30.56	Alkhabeer REIT Fund	8.08	8.08	0.0%	0.60
ACWA POWER Co.	149.80	149.80	0.0%	36.01	Allied Cooperative Insurance Group	14.04	14.04	0.0%	0.52
The Saudi National Bank	67.00	67.00	0.0%	56.33	Gulf General Coop Insurance Co.	8.52	8.52	0.0%	2.14

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	14187.00	5.2%	-16.9%	140802.77	Cie Financiere Richemont SA	17076.00	-2.7%	-29.3%	113490.20
Vodacom Group Ltd	13931.00	5.2%	3.5%	37309.04	Anglo American Platinum Ltd	121537.00	-2.1%	-30.9%	32501.30
Sanlam Ltd	5351.00	4.7%	-9.9%	48289.64	Naspers Ltd	245409.00	-1.8%	-0.7%	265279.03
British American Tobacco PLC	70575.00	3.5%	20.5%	64833.94	Sibanye Stillwater	3725.00	-1.8%	-24.1%	52750.00
Investec Ltd	8633.00	3.3%	5.3%	5531.85	AngloGold Ashanti	23217.00	-1.6%	-29.4%	24533.66
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	21332.00	23636.00	-9.7%	10318.27	Anglo American Platinum Ltd	121537.00	120101.00	1.2%	32501.30
Investec PLC	8647.00	9684.15	-10.7%	18691.17	SPAR Group Ltd/The	13259.00	12909.00	2.7%	6897.11
MultiChoice Group	12004.00	13650.00	-12.1%	11188.11	Sibanye Stillwater	3725.00	3608.00	3.2%	52750.00
Investec Ltd	8633.00	9830.56	-12.2%	5531.85	Mr Price Group Ltd	17044.00	16455.00	3.6%	24456.55
Bid Corp Ltd	31493.00	36098.00	-12.8%	34168.61	Impala Platinum Holdings Ltd	15225.00	14680.00	3.7%	59930.09

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group JSC	23200.00	4.5%	-33.9%	1106575.04	BaoViet Holdings	56500.00	-2.4%	0.9%	65653.00
Vietnam Rubber Group JSC	23200.00	4.5%	-33.9%	1106575.04	Saigon Securities Inc	21100.00	-1.9%	-54.2%	349787.36
Tien Phong Commercial Joint Stock Bank	27100.00	0.7%	-34.0%	38433.22	Mobile World Inv. Corp	61500.00	-1.8%	-8.9%	189438.45
Vietnam Prosperity	28250.00	0.7%	-21.1%	246684.65	Phu Nhuan Jewelry	113500.00	-1.7%	19.3%	77509.15
Vincom Retail	26200.00	0.6%	-13.0%	31853.96	Vietjet Aviation	124700.00	-1.6%	-2.8%	43320.78
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	113500.00	130421.95	-13.0%	77509.15	No Va Land Invest	73600.00	72000.00	2.2%	103820.16
Saigon Beer Alcohol Beverage Corp.	154000.00	181400.00	-15.1%	5929.00	Vinhomes	60000.00	57520.56	4.3%	138114.00
Vietjet Aviation	124700.00	149000.00	-16.3%	43320.78	Vincom Retail	26200.00	25100.00	4.4%	31853.96
FPT Corp	82200.00	99083.29	-17.0%	113625.06	Vietcombank	72300.00	68900.00	4.9%	43199.25
Vinamilk	71600.00	87859.93	-18.5%	105610.00	Vingroup JSC	69600.00	66200.00	5.1%	110142.00

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