



# Daily Market Report

19 July 2022

#### JSE

JSE All-Share Index surged by 2.96% to close at 67,016.13 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

#### BRVM

BRVM Composite Index closed at 208.36 points, up by 0.52% on Monday, with Sucrivoire Côte d'Ivoire and Ecobank Transnational Inc being the top gainers.

#### NSE

NSE All-Share Index increased by 0.20% to close at 52,319.94 points on Monday, as the Oil & Gas sectors recorded gains.

#### **EGX**

EGX 30 Index increased by 1.08% to close at 8,867.94 points on Monday, as the market added around LE 6.22 billion to market cap, amid Egyptian purchases.

#### **ESG**

Casablanca ESG 10 Index increased by 0.34% to close at 887.96 points on Monday

# African Markets

**Nigeria:** NSE 30 Index increased by 0.20% and closed at 1,899.50 points on Monday. Seplat and Flour Mills were the top gainers.

**Egypt:** EGX 30 Index increased by 1.08% to close at 8,867.94 points on Monday, as the market added around LE 6.22 billion to market cap, amid Egyptian purchases.

**Kenya:** NSE 20 Index decreased by 0.45% and closed at 1,674.98 points on Monday. Nation Media Group and Safaricom were the top losers

**South Africa:** JSE Top 40 Index surged by 3.15% to close at 60,760.87 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

Capital Markets		
<b>JSE</b> Johannesburg Stock Exchange	<b>A</b>	2.96%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	<b>A</b>	0.52%
NSE Nigerian Stock Exchange	<b>A</b>	0.20%
<b>EGX</b> Egyptian Stock Exchange	<b>A</b>	1.08%
ESG Casablanca Stock Exchange	<b>A</b>	0.34%

# Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	<b>₦</b> 415.90
INTERBANK RATES	
OPR	14.00 🔺
Overnight	14.00 ⇔

## **Other Emerging Markets**

**Abu Dhabi:** ADX Index was up by 0.11% to close at 9,259.8 points on Monday, as gains in the Financials, Consumer Discretionary, Industrials, Energy and Basic Materials sectors led shares higher. MSCI UAE decreased by 0.26% to close at 425.7 points.

**Vietnam:** VN-30 Index decreased by 0.48% to close at 1,214.28 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.83% to close at 769.82 points.

**Saudi Arabia:** Tadawul All Share Index jumped by 2.33% to close at 11,555.08 points on Monday, as gains in the Petrochemicals, Cement and Media & Publishing sectors led shares higher. MSCI Saudi Arabia rose by 2.45% to close at 1,607.39 points.

**India:** Nifty 50 Index climbed by 1.43% to close at 16,278.50 points on Monday, as gains in the IT, Technology and Metals sectors led shares higher. MSCI India advanced by 1.51% to close at 1,901.46 points.

### News

# Nigeria:

FG Disburses N351.65bn in W'Bank's SFTAS to Promote Fiscal Transparency Unilever Announces N1.91bn Profit In H1 2022

Traders, buyers groan as food inflation hits 20.60%

# Kenya:

IMF Approves Kenya \$236 Million Loan, Urges Reform Agenda Kept Kenya gets Sh7.5bn AfDB loan for fertiliser, seeds I&M, Dutch lender ink deal to insure Sh1.7bn SME loans

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#### Abu Dhabi:

Wizz Financial to acquire UAE Exchange

Dubai's metaverse strategy to add \$4bn to economy & create more than 40K jobs Dubai commercial real estate sales value jumps 89 percent in 1H22

#### Saudi Arabia:

Saudi Arabia's Tadawul launches TASI Islamic Index Riyad Bank's shareholders to receive \$400m in first-half dividends Healthcare provider Naba Alsaha to float IPO for 20% stake on Nomu

#### **Egypt**:

Egypt's central bank issues LE 29B in Tbills, bonds Monday Banks & cos injected EGP 46.368bn under the Real Estate Financing Initiative Datwyler offers digital infrastructure services for Egypt's public, private sectors

#### South Africa:

Offshore investors net sellers of SA stocks, bonds Tongaat asks JSE to suspend its shares

while it restructures
Old Mutual to appeal Living Hands
Umbrella Trust judgement

#### India:

5G: Jio submits earnest money of Rs 14K cr to DoT; Adani deposits Rs 100 cr Tax changes to offset duty cut on fuel; boost tax mop-up by Rs 1.35 lakh cr Yes Bank to raise \$1bn, eyes 20% in JC Flowers co

#### Vietnam:

Int'I paper, coatings, rubber, and plastic expos to attract 150 firms Banks upbeat about Q3 2022 business results

Aquatic exports surge nearly 40% in H1



Indices and FX Data	Ind	ices	and	FX	<b>Data</b>
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Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,259.80	0.1%	0.1%	-1.2%	9.1%	AED/USD	3.67	0.0%	0.0%
Egypt	8,867.94	1.1%	1.2%	-3.9%	-25.5%	EGP/USD	18.92	0.2%	20.4%
India	16,278.50	1.4%	1.4%	3.2%	-6.2%	INR/USD	79.98	0.1%	7.6%
Kenya	1,674.98	-0.4%	-0.4%	3.8%	-12.0%	KES/USD	118.40	0.1%	4.6%
Nigeria	1,899.50	0.2%	0.2%	0.6%	10.3%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,555.08	2.3%	3.5%	0.3%	2.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,760.87	3.1%	3.1%	1.1%	-9.4%	ZAR/USD	17.06	-0.1%	6.9%
Vietnam	1,214.28	-0.5%	-0.5%	-2.8%	-20.9%	VND/USD	23,447.50	0.0%	2.9%
MSCI Emerging	Markets								

MSCI Frontier	509.72	-0.2%	-0.2%	-1.5%	-23.4%	Brent Crude (\$)	106.27	5.1%	36.6%
MSCI Frontier 100	1,189.95	-0.3%	-0.3%	-1.0%	-22.4%	Gold (\$)	1,710.20	0.4%	-6.5%
MSCI Emerging	980.48	1.9%	1.9%	-2.0%	-20.4%	Copper (\$)	7,426.50	3.3%	-23.6%
MSCI World (USD)	2,567.68	-0.04%	-0.04%	0.8%	-20.5%	Coffee (\$)	181.71	-3.0%	-8.5%

# **STOCKS**

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Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₩)
Seplat Petroleum	1430.50	10.0%	120.1%	1332.43	Nigerian Breweries	53.00	-5.1%	10.4%	54.02
Wema	4.00	7.0%	406.3%	8.01	Transnational Corporation	1.22	-1.6%	23.2%	4.09
Flour Mills	34.00	2.4%	19.9%	24.63	UBN	5.40	-0.9%	-10.7%	1.03
Sterling	1.55	2.0%	3.3%	3.37	Zenith	22.00	-0.9%	-12.0%	235.68
Guaranty	21.35	1.9%	-17.9%	125.39	Fidelity	3.18	-0.3%	24.7%	5.76
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₩)
Wema	4.00	4.00	0.0%	8.36	Cap	17.00	17.00	0.0%	0.13
Transcorp Hotels	6.25	6.25	0.0%	0.02	Nascon	11.00	11.00	0.0%	0.11
Seplat Petroleum	1430.50	1430.50	0.0%	1338.29	Stanbic IBTC	31.55	31.55	0.0%	3.44
Okomu Oil	216.90	216.90	0.0%	12.14	Nestle	1400.00	1390.00	0.7%	6.53

# Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD% Val	ue (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ghitha Holding P.J.S.C.	85.40	6.8%	210.5%	46.38	Sudatel Telecom	0.32	-8.3%	-8.6%	0.01
National Marine Dredging	31.70	4.3%	143.1%	51.18	Fujairah Cement Industries	0.45	-7.1%	-23.8%	0.01
Apex Investment P.S.C	5.19	3.8%	-22.5%	3.46	Abu Dhabi Ports Company	5.20	-2.4%	43.6%	29.49
GFH Financial Group B.S.C	1.03	3.0%	-12.0%	0.16	Al Seer Marine Supplies & Equip Co	10.02	-1.8%	-27.9%	11.33
Adnoc Drilling Company PJSC	3.36	2.8%	-1.2%	17.70	ESG Emirates Stallions Grp P.J.S.C	6.46	-1.7%	-19.3%	6.71
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	1.39	1.38	1.0%	0.68
Sharjah Insurance	1.38	1.38	0.0%	0.00	Du	5.76	5.67	1.6%	1.13
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Arkan Building Materials	1.18	1.14	3.5%	4.61



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Egypt									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Credit Agricole Egypt	4.99	13.4%	-40.7%	14.04	Abu Dhabi Islamic Bank- Egypt	10.59	-1.1%	-32.8%	12.87
Medinet Nasr Housing	2.87	7.1%	-1.7%	112.58	Telecom Egypt	13.22	-1.1%	-21.2%	5.02
GB AUTO	2.70	5.1%	-47.1%	14.11	Cleopatra Hospital Company	4.30	-0.7%	-12.6%	0.49
Ezz Steel	11.38	3.8%	-24.1%	3.57	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.19	-0.5%	-8.8%	4.00
Heliopolis Housing	5.09	3.7%	-24.1%	18.38	Sidi Kerir Petrochemicals	6.84	-0.3%	-23.9%	4.29
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£)
Sidi Kerir Petrochemicals	6.84	6.84	0.0%	10.26	Cairo For Investment And Real Estate Development	10.30	10.30	0.0%	0.07
Oriental Weavers	6.38	6.38	0.0%	1.52	Commercial International Bank	36.00	36.00	0.0%	288.74
Misr Fretilizers ProductionCompany - Mopco	94.06	94.06	0.0%	6.95	Eastern Company	9.81	9.81	0.0%	45.81
Heliopolis Housing	5.09	5.09	0.0%	18.38	Citadel Capital - Common Shares	1.02	1.01	1.4%	3.45
Telecom Egypt	13.22	13.36	-1.0%	5.02	Credit Agricole Egypt	4.99	4.40	13.4%	14.04
India									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	367.20	4.8%	-22.8%	5036.386	Dr Reddys Lab	4462.00	-1.9%	-9.1%	2101.69
Indusind Bank	850.00	4.3%	-4.3%	2133.68	Britannia Inds.	3779.00	-1.8%	4.8%	1726.62
Infosys	1490.70	4.2%	-21.0%	8645.56	Hdfc Bank	1348.20	-1.0%	-8.9%	13702.09
Tech Mahindra	1010.00	3.7%	-43.6%	3980.21	Mahindra & Mahindra	1162.00	-0.9%	38.8%	4056.56
Bajaj Finserv	12255.00	3.5%	-25.3%	3438.48	Nestle India Limited	18636.00	-0.7%	-5.4%	824.42
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	3041.00	3078.00	-1.2%	1731.65	Hcl Technologies	901.00	877.35	2.7%	4640.19
Bajaj Auto	3985.00	4050.00	-1.6%	2035.48	Wipro	404.90	391.00	3.6%	2744.47
Mahindra & Mahindra	1162.00	1194.90	-2.8%	4056.56	Tata Consultancy Svs.	3065.90	2953.00	3.8%	9782.04
Maruti Suzuki India	8719.00	9050.00	-3.7%	4199.35	Hdfc Bank	1348.20	1271.60	6.0%	13702.09
Hero Motocorp	2820.95	2954.45	-4.5%	1041.47	Tech Mahindra	1010.00	943.70	7.0%	3980.21
Kenya									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn
The Cooperative Bank of	11.45	3.6%	-11.6%	1.55	Nation Media	17.60	-7.4%	-4.6%	<b>KSh</b> )
Kenya Ltd Nairobi Securities Exchange	7.94	2.8%	5.6%	0.55	Group Safaricom Plc	30.00	-4.6%	-20.9%	98.19
Plc Total Kenya Ltd	23.20	2.0%	-7.2%	0.04	Kenya Reinsurance	2.01	-3.8%	-12.6%	0.37
NCBA Group Plc	24.50	1.9%	-2.8%	27.40	Corporation Ltd Absa Bank Kenya	10.65	-1.8%	-10.1%	0.94
Kenya Power & Lighting Limited	1.42	0.7%	-18.9%	0.16	East African Breweries Limited	137.25	-1.6%	-16.8%	13.15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w	Last Price	52w L	% Change	Val (mn KSh)
Bamburi Cement Limited	35.65	40.00	-10.9%	0.27	Diamond Trust Bank Limited	49.80	48.00	3.7%	0.12

6.08

27.40

0.04

0.02

Bank Limited

Kengen Limited

Kenya Reinsurance Corporation Ltd British American Tobacco Kenya Ltd

NCBA Group Plc

3.50

2.01

420.50

24.50

3.35

1.92

400.00

23.00

4.5%

4.7%

5.1%

6.5%

148.75

29.00

27.50

108.00

-12.6%

-15.5%

-15.6%

-16.2%

130.00

24.50

23.20

90.50



0.43

0.37

1.43

27.40

Standard Chartered Bank Kenya Ltd

NCBA Group Plc

Total Kenya Ltd

Stanbic Holdings

Saudi Arabia									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Mining Co.	50.70	10.0%	-35.4%	196.90	Arabia Insurance Cooperative Co.	15.96	-9.9%	-59.6%	28.63
Sahara International Petrochemical Co.	43.75	9.9%	4.2%	173.49	United Cooperative Assurance Co.	24.30	-6.5%	-28.4%	6.46
Methanol Chemicals Co.	32.70	7.6%	-9.2%	61.37	Al Hammadi Co for Dev and Investment	40.50	-3.7%	0.5%	27.97
Middle East Paper Co.	60.00	7.3%	37.6%	26.58	Bupa Arabia for Coop Insurance Co.	153.40	-3.0%	16.7%	38.62
Almasane Alkobra Mining Co.	75.50	5.6%	-7.8%	57.89	Astra Industrial Group	45.60	-3.0%	14.6%	24.84
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.	171.40	171.40	0.0%	62.65	Al Kathiri Holding	43.20	43.20	0.0%	3.05
Elm Co.	270.00	270.00	0.0%	96.08	Naseej International Trading Co	16.54	16.54	0.0%	6.59
Saudi Tadawul Group Holding Co.	195.40	195.40	0.0%	34.04	Alkhabeer REIT Fund	8.06	8.06	0.0%	0.89
ACWA POWER Co.	152.60	152.60	0.0%	85.58	Allied Cooperative Insurance Group	14.20	14.20	0.0%	0.54
Theeb Rent a Car Co	/2.00	/2.00	0.00/	12.00	Gulf General Coop	8.71	8.71	0.0%	3.62
	62.80	62.80	0.0%	13.99	Insurance Co.	0.71	0.71	0.0%	3.02

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Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Exxaro Resources Ltd	20097.00	7.2%	31.5%	24558.92	MTN Group	14066.00	-0.9%	-17.6%	54798.25
Sibanye Stillwater Ltd	3967.00	6.5%	-19.2%	36291.62	MultiChoice Group	11902.00	-0.8%	-2.5%	7132.90
Anglo American PLC	54457.00	5.2%	-15.6%	75476.97	Vodacom Group Ltd	13907.00	-0.2%	3.3%	39715.25
SPAR Group Ltd/The	13892.00	4.8%	-16.9%	12399.76					
Cie Financiere Richemont SA	17877.00	4.7%	-25.9%	79999.58					
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)
Stocks near 52 w high Bidvest Group Ltd/The	<b>Last Price</b> 21576.00	<b>52w H</b> 23636.00	% Change -8.7%	<b>Value (mn R)</b> 10395.32	2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	<b>Last Price</b> 124083.00	<b>52w L</b> 120101.00	% Change 3.3%	Val(mn R) 46888.98
					<b>Low</b> Anglo American				
Bidvest Group Ltd/The	21576.00	23636.00	-8.7%	10395.32	Low Anglo American Platinum Ltd	124083.00	120101.00	3.3%	46888.98
Bidvest Group Ltd/The Investec PLC	21576.00 8827.00	23636.00 9684.15	-8.7% -8.9%	10395.32	Low Anglo American Platinum Ltd Sanlam Ltd	124083.00 5413.00	120101.00 5065.00	3.3%	46888.98 31429.23

# **Vietnam**

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	57300.00	1.4%	2.3%	88390.98	Vietnam Rubber Group JSC	22600.00	-2.6%	-35.6%	450395.40
Masan Group Corp	102600.00	1.4%	-27.5%	68393.16	Hoa Phat Group JSC	22600.00	-2.6%	-35.6%	450395.40
Vietnam National Petroleum Group	40250.00	1.1%	-25.3%	16216.73	Vingroup JSC	68000.00	-2.3%	-28.5%	73984.00
FPT Corp	83000.00	1.0%	7.1%	104986.70	Sai Gon Thuong Tin Commercial	22550.00	-2.0%	-28.4%	322593.54
PetroVietnam Power Corp	13100.00	0.8%	-25.1%	99757.81	Vinhomes	59000.00	-1.7%	-25.9%	119380.60
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Stocks near 52 w high Phu Nhuan Jewelry	<b>Last Price</b> 113500.00	<b>52w H</b> 130421.95	% Change -13.0%	<b>Value (mn ₫)</b> 54309.75			<b>52w L</b> 72000.00	% Change 2.2%	*
					Low	Price			
Phu Nhuan Jewelry Saigon Beer Alcohol	113500.00	130421.95	-13.0%	54309.75	<b>Low</b> No Va Land Invest	<b>Price</b> 73600.00	72000.00	2.2%	<u>a)</u> 103474.24
Phu Nhuan Jewelry Saigon Beer Alcohol Beverage Corp.	113500.00 154200.00	130421.95 181400.00	-13.0% -15.0%	54309.75 1850.40	No Va Land Invest Vinhomes	<b>Price</b> 73600.00 59000.00	72000.00 57520.56	2.2%	103474.24 119380.60

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