

Daily Market Report

20 July 2022

JSE

JSE All-Share Index advanced by 1.15% to close at 67,785.06 points on Tuesday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 207.64 points, down by 0.35% on Tuesday, with Sior Côte d'Ivoire and Setao Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index inched down by 0.02% to close at 52,308.88 points on Tuesday, as the Banking and Consumer goods sectors recorded losses.

EGX

EGX 30 Index rose by 1.87% to close at 9,033.53 points on Tuesday, as the market added around LE 8.62 billion to market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index climbed by 1.00% to close at 896.85 points on Tuesday.

African Markets

Nigeria: NSE 30 Index slipped by 0.04% and closed at 1,898.79 points on Tuesday. UBN and Unilever were the top losers.

Egypt: EGX 30 Index rose by 1.87% to close at 9,033.53 points on Tuesday, as the market added around LE 8.62 billion to market cap, amid Egyptian purchases.

Kenya: NSE 20 Index decreased by 0.21% and closed at 1,671.38 points on Tuesday. Total Kenya and Safaricom were the top losers.

South Africa: JSE Top 40 Index advanced by 1.22% to close at 61,499.12 points on Tuesday, as the Industrial and Financial sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.15%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.35%

NSE
Nigerian Stock Exchange ▼ 0.02%

EGX
Egyptian Stock Exchange ▲ 1.87%

ESG
Casablanca Stock Exchange ▲ 1.00%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.90
INTERBANK RATES	
OPR	14.38 ▲
Overnight	14.50 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.52% to close at 9,307.61 points on Tuesday, as gains in the Telecom, Financials, Real Estate, Consumer Discretionary, Energy and Basic Materials sectors led shares higher. MSCI UAE increased by 1.10% to close at 430.39 points.

Vietnam: VN-30 Index decreased by 0.21% to close at 1,211.70 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam was up by 0.11% to close at 770.66 points.

Saudi Arabia: Tadawul All Share Index jumped by 1.79% to close at 11,761.35 points on Tuesday, as gains in the Media & Publishing, Energy & Utilities and Cement sectors led shares higher. MSCI Saudi Arabia rose by 1.75% to close at 1,635.55 points.

India: Nifty 50 Index increased by 0.38% to close at 16,340.55 points on Tuesday, as gains in the Real Estate, Banking and Auto sectors led shares higher. MSCI India increased by 0.39% to close at 1,908.95 points.

News

Nigeria:

CBN raises interest rate to 14%
Buhari unveils NNPC Limited, agency halts FAAC remittances
Digital payments boost Nigeria's economy with \$3.3b

Kenya:

Diaspora Remittances Decline 3.2% to Ksh 38.5 Billion in June
Forex reserves fall amid debt repayment pressure
AfCFTA and Equity Bank Sign MOU to deepen Africa's economic integration

Abu Dhabi:

ADNOC and TotalEnergies sign gas and carbon capture partnership
NPCC launches new company NT Energies with France's Technip Energies
Dubai issues new law to support growth of real estate investment funds

Saudi Arabia:

Saudi ACWA Power, South Korea's POSCO join to develop green hydrogen
Saudi venture capital investments up 244% to a record high of \$548m
Saudi Arabia's May oil exports fell 4.5% in biggest decline in last 15 months

Egypt:

Sisi inks laws linking budget of number of general authorities with new fiscal year
Egypt targets \$485bn GDP in its economic, social development plan
AfDB agrees to grant \$271M development financing to Egypt

South Africa:

Competition Tribunal signs off on Mr Price's R3.3bn acquisition of Studio 88
Imperial Logistics's acquisition of J&J Group gets greenlight
JSE suspends Tongaat Hulett for second time in three years

India:

HUL Q1 net profit rises 14% to Rs 2,391 crore
Grasim gets into B2B e-tail biz with bldg materials, to invest Rs 2,000cr over 5 yrs
L&T Finance Holdings June qtr net profit rises 47 pc to Rs 261 crore

Vietnam:

Vietnam's trade surplus to EU surges by nearly 40% in H1
Vietnam Airlines signs cooperation deal with Turkish Airlines
Inflation in check due to favourable factors

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,307.61	0.5%	0.6%	-0.7%	9.7%	AED/USD	3.67	0.0%	0.0%
Egypt	9,033.53	1.9%	3.1%	-2.1%	-24.1%	EGP/USD	18.95	0.2%	20.6%
India	16,340.55	0.4%	1.8%	3.6%	-5.8%	INR/USD	79.95	0.0%	7.6%
Kenya	1,671.38	-0.2%	-0.7%	3.6%	-12.2%	KES/USD	118.55	0.1%	4.8%
Nigeria	1,898.79	-0.04%	0.2%	0.6%	10.2%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,761.35	1.8%	5.4%	2.1%	3.8%	SAR/USD	3.76	0.0%	0.0%
South Africa	61,499.12	1.2%	4.4%	2.3%	-8.3%	ZAR/USD	17.04	-0.1%	6.7%
Vietnam	1,211.70	-0.2%	-0.7%	-3.0%	-21.1%	VND/USD	23,417.00	-0.1%	2.8%

MSCI Emerging Markets

MSCI Frontier	511.67	0.4%	0.1%	-1.1%	-23.1%	Brent Crude (\$)	107.35	1.0%	38.0%
MSCI Frontier 100	1,195.38	0.5%	0.2%	-0.5%	-22.0%	Gold (\$)	1,728.10	1.0%	-5.5%
MSCI Emerging	979.94	-0.1%	1.9%	-2.1%	-20.5%	Copper (\$)	7,277.50	-2.0%	-25.1%
MSCI World (USD)	2,628.34	2.4%	2.3%	3.2%	-18.7%	Coffee (\$)	192.65	6.0%	-3.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	26.50	2.5%	11.8%	36.32	UBN	5.20	-3.7%	-14.0%	4.19
FBNH	11.20	1.8%	-2.6%	140.50	Unilever	15.00	-3.2%	11.9%	14.20
UBA	7.50	0.7%	-6.3%	556.84	International Breweries	5.70	-1.7%	21.3%	8.84
FCMB	3.05	0.7%	2.3%	4.58	Access	9.15	-1.1%	0.5%	146.45
Dangote Sugar	16.10	0.6%	-2.4%	7.34	Fidelity	3.15	-0.9%	23.5%	16.51
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%	8.71	Cap	17.00	17.00	0.0%	8.94
Transcorp Hotels	6.25	6.25	0.0%	0.44	Nascon	11.00	11.00	0.0%	0.95
Seplat Petroleum	1430.50	1430.50	0.0%	197.11	Stanbic IBTC	31.55	31.55	0.0%	2.95
Okomu Oil	216.90	216.90	0.0%	0.68	Nestle	1400.00	1390.00	0.7%	51.41
Airtel Africa	1905.40	1905.40	0.0%	6.96	Access	9.15	9.00	1.7%	147.25

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Response Plus Holding	8.30	6.4%	-14.0%	8.70	National Marine Dredging	30.00	-5.4%	130.1%	37.32
Q Holding Psc	3.73	2.8%	-15.4%	2.34	Ghitha Holding P.J.S.C.	82.00	-4.0%	198.2%	46.09
Adnoc Drilling Company PJSC	3.43	2.1%	0.9%	27.22	Methaq Takaful Ins.	0.71	-2.1%	-13.0%	0.03
Emirates Telecom	26.04	2.0%	-17.9%	48.59	Adc Acquisition Corp Pjsc Shares	11.22	-1.8%	2.6%	0.01
Chimera S&P Ksa Shariah Etf-Share Class B-Income	3.52	2.0%	-4.9%	0.04	Waha Capital	1.37	-1.4%	14.2%	1.30
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	Sharjah Cement	0.58	0.58	0.9%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	1.78
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Abu Dhabi National Energy	1.20	1.13	6.0%	1.26

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Cairo For Investment And RealEstate Development	11.36	10.3%	-16.5%	7.85	Cleopatra Hospital Company	4.08	-5.1%	-17.1%	108.65
Orascom Development Egypt	3.69	4.8%	-38.5%	1.35	Medinet Nasr Housing	2.77	-3.5%	8.7%	159.16
Orascom Development Egypt	3.69	4.8%	-38.5%	1.35	Sidi Kerir Petrochem -SIDPEC	6.77	-1.0%	-13.2%	7.53
Egyptian Financial Group-Hermes Holding Company	10.90	4.1%	-11.7%	33.02	Orascom Construction PLC	54.62	-0.8%	-28.0%	8.42
Housing & Development Bank	33.38	4.1%	-24.2%	4.14					
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£)
Medinet Nasr Housing	2.77	3.00	-7.7%	159.16	Cleopatra Hospital Company	4.08	4.00	2.0%	108.65
Misir Fertilizers ProductionCompany - Mopco	96.10	114.00	-15.7%	6.37	Oriental Weavers	6.46	6.30	2.5%	1.50
Egyptian Kuwaiti Holding-EGP	21.47	25.50	-15.8%	26.94	Abu Dhabi Islamic Bank- Egypt	10.62	10.31	3.1%	1.87
Alexandria Mineral Oils Company	3.64	4.48	-18.8%	2.51	Eastern Company	10.10	9.75	3.6%	3.64
Eastern Company	10.10	12.77	-20.9%	3.64	Fawry For Banking Tech And E Payment	2.88	2.77	4.0%	25.22

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Axis Bank	699.75	2.2%	3.1%	7083.100	ONGC	125.95	-3.0%	-11.6%	4389.89
Apollo Hospitals Enterprise Ltd	4029.00	2.1%	-19.8%	1649.53	HDFC Life Insurance Company	535.45	-1.4%	-17.6%	2503.65
Mahindra & Mahindra	1185.00	1.9%	41.6%	4783.69	Nestle India Limited	18380.00	-1.3%	-6.7%	803.47
Indusind Bank	866.40	1.8%	-2.4%	2234.20	Sun Pharma Industries	874.50	-0.9%	3.4%	1411.71
Tata Steel	920.00	1.7%	-17.2%	7825.31	Tata Consumer products Ltd.	788.00	-0.8%	6.0%	932.88
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	294.45	296.95	-0.8%	2700.94	Hcl Technologies	889.05	877.35	1.3%	4128.62
Eicher Motors	3062.00	3089.00	-0.9%	2234.16	Wipro	405.50	391.00	3.7%	2611.29
Bajaj Auto	3995.00	4050.00	-1.4%	2053.38	Tata Consultancy Svs.	3076.00	2953.00	4.2%	5716.04
Maruti Suzuki India	8708.70	9050.00	-3.8%	4177.32	Hdfc Bank	1348.20	1271.60	6.0%	10652.38
Coal India	198.00	209.00	-5.3%	1962.67	Tech Mahindra	1009.00	943.70	6.9%	2996.89

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	94.75	4.7%	8.6%	0.20	Total Kenya Ltd	22.20	-4.3%	-11.2%	0.10
Kenya Reinsurance Corporation Ltd	2.07	3.0%	-10.0%	0.05	Safaricom Plc	28.90	-3.7%	-23.8%	77.40
Nation Media Group	18.00	2.3%	-2.4%	0.01	KCB Group Plc	38.75	-3.0%	-14.7%	15.29
East African Breweries Limited	138.75	1.1%	-15.9%	0.18	NCBA Group Plc	23.95	-2.2%	-5.0%	1.38
British American Tobacco Kenya Ltd	425.00	1.1%	-3.7%	5.10	Equity Group Holdings Plc	44.00	-1.1%	-16.6%	11.73
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	35.50	40.00	-11.3%	0.13	NCBA Group Plc	23.95	23.00	4.1%	1.38
Stanbic Holdings	94.75	108.00	-12.3%	0.20	Diamond Trust Bank Limited	50.00	48.00	4.2%	0.38
Standard Chartered Bank Kenya Ltd	130.25	148.75	-12.4%	2.45	Kengen Limited	3.49	3.35	4.2%	0.88
British American Tobacco Kenya Ltd	425.00	512.00	-17.0%	5.10	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	5.10
Nairobi Securities Exchange Plc	7.98	9.64	-17.2%	0.08	Total Kenya Ltd	22.20	20.65	7.5%	0.10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Almunajem Foods Co.	63.80	10.0%	9.8%	24.20	United Cooperative Assurance Co.	21.88	-10.0%	-35.6%	7.81
Almasane Alkobra Mining Co.	83.00	9.9%	1.3%	251.78	Arabia Insurance Cooperative Co.	14.38	-9.9%	-63.6%	51.94
Saudi Research and Marketing Group	190.60	9.9%	-2.9%	32.60	Allianz Saudi Fransi Coop Insurance Co.	13.68	-9.9%	-47.1%	8.84
Saudi Arabian Mining Co.	55.50	9.5%	-29.3%	436.79	CHUBB Arabia Coop Insurance Co.	19.04	-9.3%	-47.9%	7.21
Saudi Marketing Co.	22.10	9.1%	-23.3%	9.88	Saudi Arabian Coop Insurance Co.	17.70	-7.1%	-19.3%	6.07
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.	174.00	174.00	0.0%	67.75	Alkhabeer REIT Fund	8.05	8.05	0.0%	1.40
Elm Co.	284.80	284.80	0.0%	161.69	Allied Cooperative Insurance Group	14.20	14.20	0.0%	1.50
Saudi Tadawul Group Holding Co.	200.00	200.00	0.0%	89.25	CHUBB Arabia Coop Insurance Co.	19.04	19.04	0.0%	7.21
ACWA POWER Co.	160.00	160.00	0.0%	149.88	Gulf General Coop	8.60	8.60	0.0%	4.04
Theeb Rent a Car Co	63.00	63.00	0.0%	19.04	Gulf Union Alahlia	9.13	9.13	0.0%	0.36

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Cie Financiere Richemont SA	18780.00	5.1%	-22.2%	50265.93	AngloGold Ashanti	23855.00	-1.5%	-27.4%	13808.59
Prosus NV	117726.00	3.7%	-10.1%	98063.17	Anglo American Platinum Ltd	122336.00	-1.4%	-30.4%	32262.57
Naspers Ltd	264447.00	3.3%	7.0%	180082.85	Sibanye Stillwater	3914.00	-1.3%	-20.3%	36981.55
Mondi PLC	30800.00	1.8%	-22.1%	17628.35	Anglo American PLC	53777.00	-1.2%	-16.6%	47505.42
Absa Group Ltd	16290.00	1.7%	6.8%	37190.59	Impala Platinum Holdings Ltd	15684.00	-1.2%	-30.3%	43885.67
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)
Investec PLC	8926.00	9684.15	-7.8%	10240.24	Anglo American Platinum Ltd	122336.00	120002.00	1.9%	32262.57
Bidvest Group Ltd/The	21748.00	23636.00	-8.0%	14172.04	Northam Platinum	15229.00	14299.00	6.5%	16082.19
Bid Corp Ltd	32632.00	36098.00	-9.6%	31869.98	Impala Platinum Holdings Ltd	15684.00	14680.00	6.8%	43885.67
Investec Ltd	8843.00	9830.56	-10.0%	9844.02	Mr Price Group Ltd	17635.00	16455.00	7.2%	27404.30
Clicks Group Ltd	29036.00	32943.00	-11.9%	21843.49	Sanlam Ltd	5461.00	5065.00	7.8%	16187.05

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam National Petroleum Group	42100.00	4.6%	-21.9%	45042.79	Phu Nhuan Jewelry	110500.00	-2.6%	16.1%	56520.75
Petrovietnam Gas	101900.00	4.5%	8.8%	95164.41	Vietnam Rubber Group JSC	22150.00	-2.0%	-36.9%	360533.34
PetroVietnam Power Corp	13450.00	2.7%	-23.1%	196891.86	Hoa Phat Group JSC	22150.00	-2.0%	-36.9%	360533.34
Sai Gon Thuong Tin Commercial	22950.00	1.8%	-27.1%	268308.45	Mobile World Inv. Corp	60000.00	-1.6%	-11.1%	127080.00
Saigon Beer Alcohol Beverage Corp.	156800.00	1.7%	6.1%	21795.20	Vietnam JSC Bank	26550.00	-1.3%	-21.7%	71762.00
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Saigon Beer Alcohol Beverage Corp.	156800.00	181400.00	-13.6%	21795.20	No Va Land Invest	73600.00	72000.00	2.2%	112365.12
Phu Nhuan Jewelry	110500.00	130421.95	-15.3%	56520.75	Vinhomes	58800.00	57520.56	2.2%	109650.24
FPT Corp	83000.00	99083.29	-16.2%	98388.20	Vietcombank	71300.00	68900.00	3.5%	57902.73
Vietjet Aviation	124500.00	149000.00	-16.4%	45504.75	Vincom Retail	26000.00	25100.00	3.6%	24385.40
Vinamilk	72800.00	87859.93	-17.1%	111391.28	Vingroup JSC	68800.00	66200.00	3.9%	45091.52

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