

Daily Market Report

21 July 2022

JSE

JSE All-Share Index decreased by 0.20% to close at 67,652.44 points on Wednesday, as the Industrial and Financial sectors recorded losses.

BRVM

BRVM Composite Index closed at 207.55 points, down by 0.04% on Wednesday, with Total Senegal and Sicom Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index decreased by 0.23% to close at 52,186.52 points on Wednesday, as the Consumer goods, Oil & Gas, Insurance and Banking sectors recorded losses.

EGX

EGX 30 Index increased by 0.88% to close at 9,112.72 points on Wednesday, as the market added LE 4.1 billion of market cap, amid Egyptian purchases.

ESG

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

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.20%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.04%
NSE Nigerian Stock Exchange	▼ 0.23%
EGX Egyptian Stock Exchange	▲ 0.88%
ESG Casablanca Stock Exchange	▲ 0.13%

African Markets

Nigeria: NSE 30 Index decreased by 0.25% and closed at 1,894.05 points on Wednesday. Nigerian Breweries and International Breweries were the top losers.

Egypt: EGX 30 Index increased by 0.88% to close at 9,112.72 points on Wednesday, as the market added LE 4.1 billion of market cap, amid Egyptian purchases.

Kenya: NSE 20 Index inched up by 0.004% and closed at 1,671.45 points on Wednesday. Nation Media Group and Total Kenya were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.20% to close at 61,379.04 points on Wednesday, as the Industrial and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.90
INTERBANK RATES	
OPR	14.83 ▲
Overnight	15.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.98% to close at 9,398.77 points on Wednesday, as gains in the Telecom, Financials, Real Estate, Utilities and Basic Materials sectors led shares higher. MSCI UAE surged by 2.36% to close at 440.53 points.

Vietnam: VN-30 Index advanced by 1.15% to close at 1,225.62 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.93% to close at 777.79 points.

Saudi Arabia: Tadawul All Share Index increased by 0.88% to close at 11,864.34 points on Wednesday, as gains in the Energy & Utilities, Financial Services and Building & Construction sectors led shares higher. MSCI Saudi Arabia increased by 0.56% to close at 1,644.76 points.

India: Nifty 50 Index climbed by 1.10% to close at 16,520.85 points on Wednesday, as gains in the IT, Technology and Metals sectors led shares higher. MSCI India increased by 0.90% to close at 1,926.1 points.

News

Nigeria:

DMO Raises N8.8bn From Savings Bond
Standard Chartered Acts as Lead Issuing
House for Dangote's Debut Bond
FG to Spend N1.4tn on Health Insurance
Premium for Vulnerable Nigerians

Kenya:

Expensive fuel looms as IMF drops
support for subsidy
KQ reneges on new share promise to
small owners
Kenya Airways, South Africa carrier sign
codeshare deal

Abu Dhabi:

Abu Dhabi Islamic Bank's Q2 profit up 45%
on lower provisioning charges
NMDC churns up Dh403m in 1H22 net
profit with help from overseas wins
UAE GDP grew 8.2% in Q1 2022: Central
Bank

Saudi Arabia:

Saudi Arabia to cut airport charges by 35%
amid continuing privatization
IT consulting firm Saudi Networkers sets
IPO price at \$19 per share
Moody's projects Saudi economy to grow
3.9% by 2026

Egypt:

Serbia, Egypt agree to boost cooperation
amid war in Ukraine
Egypt to list army companies Wataniya and
Safi
Agthia expands in Egypt with majority
holding in food group Abu Auf

South Africa:

Consumer inflation surges to a 13-year
high
BHP produces strong fourth quarter but
warns of tough times ahead
Record-low real rate sets stage for
aggressive SA hike

India:

India's exports grow 25 pc to 13.49 MT in
FY22; imports fall 1.68 pc to 4.67 MT
IndusInd Q1 profit up 61% at Rs 1.6k cr
BHP, Tata team up for low-carbon steel
mfg

Vietnam:

Vietnam's IT revenues up 18% in H1
Vietjet, Boeing sign deal for 200 aircraft as
part of airline's global strategy
HDBank to capitalise 25 per cent dividend

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,398.77	1.0%	1.6%	0.3%	10.7%	AED/USD	3.67	0.0%	0.0%
Egypt	9,112.72	0.9%	3.9%	-1.2%	-23.5%	EGP/USD	18.95	0.0%	20.6%
India	16,520.85	1.1%	2.9%	4.7%	-4.8%	INR/USD	79.99	0.0%	7.6%
Kenya	1,671.45	0.004%	-0.7%	3.6%	-12.1%	KES/USD	118.55	0.0%	4.8%
Nigeria	1,894.05	-0.2%	-0.1%	0.3%	10.0%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,864.34	0.9%	5.1%	3.0%	4.7%	SAR/USD	3.76	0.1%	0.1%
South Africa	61,379.04	-0.2%	4.2%	2.1%	-8.5%	ZAR/USD	17.09	0.3%	7.1%
Vietnam	1,225.62	1.1%	0.4%	-1.9%	-20.2%	VND/USD	23,420.00	0.0%	2.8%

MSCI Emerging Markets

MSCI Frontier	512.07	0.1%	0.2%	-1.0%	-23.1%	Brent Crude (\$)	106.92	-0.4%	37.5%
MSCI Frontier 100	1,195.90	0.04%	0.2%	-0.5%	-22.0%	Gold (\$)	1,717.70	-0.6%	-6.1%
MSCI Emerging	986.57	0.7%	2.6%	-1.4%	-19.9%	Copper (\$)	7,378.00	1.4%	-24.1%
MSCI World (USD)	2,643.93	0.6%	2.9%	3.8%	-18.2%	Coffee (\$)	193.58	0.5%	-2.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.07	0.7%	3.0%	5.92	Nigerian Breweries	49.75	-6.1%	3.6%	1512.64
FBNH	11.25	0.4%	-2.2%	196.63	International Breweries	5.45	-4.4%	16.0%	12.68
					Guaranty	20.90	-2.6%	-19.6%	353.45
					Fidelity	3.10	-1.6%	21.6%	21.33
					Axamansard	1.97	-1.5%	-11.7%	1.21
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%	0.00	Cap	17.00	17.00	0.0%	0.22
Seplat Petroleum	1430.50	1430.50	0.0%	141.47	Nascon	11.00	11.00	0.0%	0.63
Okomu Oil	216.90	216.90	0.0%	1.45	Stanbic IBTC	31.55	31.55	0.0%	1.80
Airtel Africa	1905.40	1905.40	0.0%	6.38	Access	9.05	9.00	0.6%	198.22
Wema	3.99	4.00	-0.2%	13.72	Nestle	1400.00	1390.00	0.7%	20.53

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National for Building Materials	0.19	11.2%	-24.1%	0.01	Gulf Medical Projects	2.24	-9.7%	31.8%	0.00
GHITHA HOLDING P.J.S.C.	89.95	9.7%	227.1%	46.26	RESPONSE PLUS HOLDING	8.05	-3.0%	-16.6%	6.15
FERTIGLOBE PLC	4.65	5.2%	32.1%	27.08	National Marine Dredging	29.10	-3.0%	123.2%	28.29
Emirates Telecom	27.24	4.6%	-14.1%	70.89	ALPHA DHABI HOLDING PJSC	23.96	-1.7%	-12.2%	112.31
Abu Dhabi Commercial Bank	8.94	3.4%	4.8%	28.36	Abu Dhabi National Oil Co.	4.18	-1.4%	-2.1%	53.19
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	1.40	1.37	2.2%	0.62
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sharjah Cement	0.60	0.58	4.0%	0.05
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	1.16
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Sudatel Telecom	0.32	0.30	6.7%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ibsina Pharma	1.24	6.8%	-64.4%	29.10	Egyptian Financial Group-Hermes	10.66	-2.2%	-13.6%	36.39
Fawry For Banking Tech And Electronic Payment	3.06	6.3%	-55.9%	85.91	Orascom Development Egypt	3.65	-1.1%	-39.2%	15.17
E-finance For Digital and Financial Investments	12.65	6.2%	-37.7%	5.42	Eastern Company	10.00	-1.0%	-6.7%	5.39
Medinet Nasr Housing	2.90	4.7%	13.8%	93.74	Cleopatra Hospital Company	4.05	-0.7%	-17.7%	42.96
Citadel Capital - Common Shares	1.09	4.2%	-9.9%	6.97	Telecom Egypt	13.25	-0.5%	-21.0%	5.64
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	2.90	3.00	-3.3%	93.74	Cleopatra Hospital Company	4.05	4.00	1.3%	42.96
Misr Fertilizers Production Company - Mopco	98.28	114.00	-13.8%	1.21	Eastern Company	10.00	9.75	2.6%	5.39
Egyptian Kuwaiti Holding-EGP	21.48	25.50	-15.8%	11.45	Oriental Weavers	6.47	6.30	2.7%	5.00
Alexandria Mineral Oils Company	3.73	4.48	-16.7%	7.09	Telecom Egypt	13.25	12.77	3.8%	5.64
Eastern Company	10.00	12.77	-21.7%	5.39	Abu Dhabi Islamic Bank- Egypt	10.71	10.31	3.9%	2.72

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ONGC	132.65	3.7%	-6.8%	8072.847	HDFC Life Insurance Company	525.25	-2.0%	-19.1%	4773.42
Tech Mahindra	1044.00	3.6%	-41.7%	5791.17	Mahindra & Mahindra	1164.65	-1.8%	39.1%	3557.03
Tata Consultancy Svs.	3161.00	2.8%	-15.4%	10693.55	Sun Pharma Industries	865.45	-1.1%	2.3%	2513.10
Hcl Technologies	914.50	2.8%	-30.7%	4392.17	Eicher Motors	3044.75	-1.1%	17.5%	1326.75
Reliance Industries	2499.00	2.5%	5.5%	27676.12	Kotak Mahindra Bank	1820.00	-0.8%	1.3%	4723.51
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	4004.65	4055.00	-1.2%	1518.44	Hcl Technologies	914.50	877.35	4.2%	4392.17
Eicher Motors	3044.75	3111.00	-2.1%	1326.75	Wipro	411.70	391.00	5.3%	5204.59
Mahindra & Mahindra	1164.65	1195.00	-2.5%	3557.03	HDFC Life Insurance Company	525.25	497.05	5.7%	4773.42
Maruti Suzuki India	8739.95	9050.00	-3.4%	3503.72	Tata Consultancy Svs.	3161.00	2953.00	7.0%	10693.55
Hero Motocorp	2820.45	2954.45	-4.5%	569.45	Hdfc Bank	1363.55	1271.60	7.2%	13878.77

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	18.75	4.2%	1.6%	0.03	Safaricom Plc	28.15	-2.6%	-25.8%	250.57
Total Kenya Ltd	23.00	3.6%	-8.0%	0.31	Kenya Reinsurance Corporation Ltd	2.03	-1.9%	-11.7%	0.49
Standard Chartered Bank Kenya Ltd	132.00	1.3%	2.9%	1.06	Bamburi Cement Limited	35.00	-1.4%	-7.9%	0.05
British American Tobacco Kenya Ltd	430.00	1.2%	-2.6%	0.30	Kenya Power & Lighting Limited	1.40	-1.4%	-20.0%	0.95
Equity Group Holdings Plc	44.50	1.1%	-15.6%	87.46	The Cooperative Bank of Kenya Ltd	11.25	-1.3%	-13.1%	0.96
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)
Standard Chartered Bank Kenya Ltd	132.00	148.75	-11.3%	1.06	Diamond Trust Bank Limited	49.60	48.00	3.3%	0.28
Stanbic Holdings	94.75	108.00	-12.3%	0.00	Kengen Limited	3.50	3.35	4.5%	1.91
Bamburi Cement Limited	35.00	40.00	-12.5%	0.05	NCBA Group Plc	24.05	23.00	4.6%	0.74
British American Tobacco Kenya Ltd	430.00	512.00	-16.0%	0.30	Kenya Reinsurance Corporation Ltd	2.03	1.92	5.7%	0.49
Total Kenya Ltd	23.00	27.50	-16.4%	0.31	British American Tobacco Kenya Ltd	430.00	400.00	7.5%	0.30

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Moammar Information Systems Co.	96.80	10.0%	-36.1%	24.47	United Cooperative Assurance Co.	19.70	-10.0%	-42.0%	3.40
Al Abdullatif Industrial Investment Co.	19.60	10.0%	-33.7%	33.87	Saudi Arabian Coop Insurance Co.	15.94	-9.9%	-27.3%	17.26
Almunajem Foods Co.	69.90	9.6%	20.3%	120.48	Allianz Saudi Fransi Coop Insurance Co.	12.60	-7.9%	-51.3%	48.06
Almasane Alkobra Mining Co.	88.40	6.5%	7.9%	283.94	CHUBB Arabia Coop Insurance Co.	17.92	-5.9%	-51.0%	20.67
Saudi Advanced Industries Co.	35.50	6.5%	-25.3%	156.66	Arabia Insurance Cooperative Co.	13.54	-5.8%	-65.8%	64.31
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.	173.40	173.40	0.0%	27.82	Alkhabeer REIT Fund	8.08	8.08	0.0%	4.93
Elm Co.	282.80	282.80	0.0%	78.64	Allied Cooperative Insurance Group	14.08	14.08	0.0%	1.43
Almunajem Foods Co.	69.90	69.90	0.0%	120.48	CHUBB Arabia Coop Insurance Co.	17.92	17.92	0.0%	20.67
Saudi Tadawul Group Holding Co.	199.80	199.80	0.0%	74.76	Gulf General Coop Insurance Co.	8.47	8.47	0.0%	3.94
ACWA POWER Co.	167.20	167.20	0.0%	156.80	Gulf Union Alahlia	8.98	8.98	0.0%	1.12

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	8739.00	1.6%	7.7%	27455.20	Investec Ltd	8522.00	-3.6%	3.9%	7218.02
Prosus NV	119273.00	1.3%	-8.9%	124861.42	Investec PLC	8652.00	-3.1%	6.6%	8181.51
Absa Group Ltd	16420.00	0.8%	7.6%	49556.23	Anglo American Platinum Ltd	119000.00	-2.7%	-32.3%	39755.52
Northam Platinum Ltd	15348.00	0.8%	-26.7%	14199.89	Bid Corp Ltd	31895.00	-2.3%	-2.3%	15282.65
Exxaro Resources Ltd	20393.00	0.7%	33.4%	10310.33	Old Mutual Ltd	1126.00	-2.2%	-14.0%	20871.55
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	21592.00	23636.00	-8.6%	15680.93	Anglo American Platinum Ltd	119000.00	116354.00	2.3%	39755.52
Investec PLC	8652.00	9684.15	-10.7%	8181.51	Old Mutual Ltd	1126.00	1063.00	5.9%	20871.55
Bid Corp Ltd	31895.00	36098.00	-11.6%	15282.65	Mr Price Group Ltd	17500.00	16455.00	6.4%	19111.70
Naspers Ltd	266000.00	301297.00	-11.7%	227628.70	Sanlam Ltd	5387.00	5065.00	6.4%	22098.00
Clicks Group Ltd	28558.00	32943.00	-13.3%	16485.42	SPAR Group Ltd/The	13733.00	12909.00	6.4%	5335.41

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Tien Phong Commercial Joint Stock Bank	28450.00	4.8%	-30.7%	87520.74	Vingroup JSC	68200.00	-0.9%	-28.3%	42700.02
Saigon Securities Inc	21300.00	3.1%	-53.7%	474825.99					
Phu Nhuan Jewelry	113600.00	2.8%	19.4%	101887.84					
FPT Corp	84900.00	2.3%	9.5%	241871.61					
Bank for Inv. and Devp	36400.00	2.1%	-1.9%	57795.92					
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.	159800.00	181400.00	-11.9%	17130.56	No Va Land Invest	73900.00	72000.00	2.6%	67840.20
Phu Nhuan Jewelry	113600.00	130421.95	-12.9%	101887.84	Vingroup JSC	68200.00	66200.00	3.0%	42700.02
FPT Corp	84900.00	99083.29	-14.3%	241871.61	Vincom Retail	26050.00	25100.00	3.8%	37092.60
Vietjet Aviation	125500.00	149000.00	-15.8%	61758.55	Vinhomes	59700.00	57520.56	3.8%	114027.00
Vinamilk	73000.00	87859.93	-16.9%	85249.40	Vietcombank	72500.00	68900.00	5.2%	39505.25

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

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