

Daily Market Report

22 July 2022

JSE

JSE All-Share Index increased by 0.38% to close at 67,907.25 points on Thursday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 207.57 points, up marginally by 0.01% on Thursday, with Vivo Energy Côte d'Ivoire and Sode Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 0.12% to close at 52,122.00 points on Thursday, as the Consumer goods, Banking, and Industrial sectors recorded losses.

EGX

EGX 30 Index jumped by 1.94% to close at 9,289.81 points on Thursday, as the market added around LE 7.02 billion to market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index decreased by 0.29% to close at 895.39 points on Thursday.

African Markets

Nigeria: NSE 30 Index was down by 0.16% and closed at 1,894.05 points on Thursday. International Breweries and Sterling were the top losers.

Egypt: EGX 30 Index jumped by 1.94% to close at 9,289.81 points on Thursday, as the market added around LE 7.02 billion to market cap, amid Egyptian purchases.

Kenya: NSE 20 Index increased by 0.21% and closed at 1,675.02 points on Thursday. Stanbic Holdings and British American Tobacco Kenya were the top gainers.

South Africa: JSE Top 40 Index increased by 0.44% to close at 61,646.59 points on Thursday, as the Industrial and Financial sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.38%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.01%

NSE
Nigerian Stock Exchange ▼ 0.12%

EGX
Egyptian Stock Exchange ▲ 1.94%

ESG
Casablanca Stock Exchange ▼ 0.29%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.72
INTERBANK RATES	
OPR	14.75 ▼
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index rose by 2.12% to close at 9,597.68 points on Thursday, as gains in the Telecom, Financials, Real Estate, Energy, Utilities and Basic Materials sectors led shares higher. MSCI UAE surged by 3.22% to close at 454.73 points.

Vietnam: VN-30 Index increased by 0.79% to close at 1,235.25 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.57% to close at 782.19 points.

Saudi Arabia: Tadawul All Share Index increased by 1.04% to close at 11,987.97 points on Thursday, as gains in the Energy & Utilities, Retail and Media & Publishing sectors led shares higher. MSCI Saudi Arabia climbed by 1.05% to close at 1,662.00 points.

India: Nifty 50 Index increased by 0.51% to close at 16,605.25 points on Thursday, as gains in the Capital Goods, Oil & Gas and Power sectors led shares higher. MSCI India increased by 0.84% to close at 1,942.24 points.

News

Nigeria:

Zenith Bank, others move to boost non-oil exports
TrustBanc raises ₦5.85bn from commercial paper
Jaiz Bank plans ₦150b Sukuk issuance

Kenya:

IMF Sets Loan Condition for Kenya to Drop Fuel Subsidy by Oct
Cash from Kenyans in US plunge on America inflation
No cheap loans for Kenya as lenders eye higher rates

Abu Dhabi:

Du's Q2 profit rises 26% on strong demand for mobile services
Bain Capital, Abu Dhabi investment firm to buy Merchants Automotive Group
UAE toughens gold import rules, with penalties of Dh5m

Saudi Arabia:

Saudi Arabia announces plan to automate 4,000 factories
Saudi's Kingdom Holding invests \$229mln in UK fund manager M&G
Saudi station network Aldrees sees 44% profit surge in H1 on higher sales

Egypt:

Egypt approves establishment of Suez Canal Authority Fund
EU grants Egypt €117.9M to support water, energy sectors
BUNA payment platform eyes adding more banking services- CBE

South Africa:

Sarb announces sharper 75bp repo rate hike
Vodacom to move tower ops to separate legal entity
Anglo American Q2 production falls 9%

India:

Govt to float Eol for IDBI Bank stake sale in a month
J&K Bank ties up with Ebix for international remittances
Reliance to bring Italian luxe label Valentino to India

Vietnam:

SOEs earn revenue worth nearly VNĐ900 tn in H1, up 27%
Textile-garment exports set to reach 43 billion USD this year
Việt Nam FinTech market expected to reach \$18 billion by 2024

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,597.68	2.1%	3.8%	2.4%	13.1%	AED/USD	3.67	0.0%	0.0%
Egypt	9,289.81	1.9%	5.9%	0.7%	-22.0%	EGP/USD	18.95	0.0%	20.6%
India	16,605.25	0.5%	3.5%	5.2%	-4.3%	INR/USD	79.94	-0.1%	7.5%
Kenya	1,675.02	0.2%	-0.4%	3.9%	-12.0%	KES/USD	118.60	0.0%	4.8%
Nigeria	1,891.11	-0.2%	-0.2%	0.2%	9.8%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,987.97	1.0%	6.2%	4.0%	5.8%	SAR/USD	3.76	0.0%	0.1%
South Africa	61,646.59	0.4%	4.7%	2.6%	-8.1%	ZAR/USD	17.07	-0.1%	6.9%
Vietnam	1,235.25	0.8%	1.2%	-1.1%	-19.6%	VND/USD	23,415.00	0.0%	2.7%

MSCI Emerging Markets

MSCI Frontier	515.21	0.6%	0.8%	-0.4%	-22.6%	Brent Crude (\$)	103.86	-2.9%	33.5%
MSCI Frontier 100	1,202.17	0.5%	0.7%	0.05%	-21.6%	Gold (\$)	1,731.30	0.8%	-5.3%
MSCI Emerging	990.69	0.4%	3.0%	-1.0%	-19.6%	Copper (\$)	7,322.00	-0.8%	-24.7%
MSCI World (USD)	2,663.84	0.8%	3.7%	4.6%	-17.6%	Coffee (\$)	192.2	-0.7%	-3.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	11.20	0.9%	16.7%	139.26	International Breweries	4.95	-9.2%	5.3%	42.70
Access	9.10	0.6%	0.0%	94.09	Sterling	1.50	-2.6%	0.0%	4.96
					UBN	5.10	-1.9%	-15.7%	4.49
					Lafarge Africa	26.00	-1.9%	9.7%	91.57
					Transnational Corporation	1.20	-1.6%	21.2%	7.55
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%	0.02	Cap	17.00	17.00	0.0%	0.07
Seplat Petroleum	1430.50	1430.50	0.0%	12.82	Nascon	11.00	11.00	0.0%	1.86
Okomu Oil	216.90	216.90	0.0%	1.00	Stanbic IBTC	31.55	31.55	0.0%	0.91
Airtel Africa	1905.40	1905.40	0.0%	135.09	Nestle	1400.00	1390.00	0.7%	46.69
Wema	3.99	4.00	-0.2%	0.44	Access	9.10	9.00	1.1%	94.23

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sudatel Telecom	0.35	8.1%	-1.1%	0.12	Abu Dhabi Natnl for Building Materials	0.17	-9.5%	-31.3%	0.01
Fujairah Cement Industries	0.48	7.6%	-17.9%	0.00	Gulf Medical Projects	2.10	-6.3%	23.5%	0.03
Abu Dhabi Islamic Bank	8.98	5.7%	30.7%	34.91	ADC Acquisition Corp PJSC Warrants	1.50	-5.1%	100.0%	0.09
Emirates Telecom	28.34	4.0%	-10.6%	82.23	Easylease motorcycle rentals	40.02	-4.5%	38.0%	16.02
CHIMERA S&P US SHARIAH GROWTH ETF	3.86	4.0%	4.6%	0.15	National Marine Dredging	27.92	-4.1%	114.1%	20.52
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%	1.04
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.17	1.14	2.6%	4.29
Sharjah Insurance	1.38	1.38	0.0%	0.00	Sharjah Cement	0.60	0.58	4.0%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Abu Dhabi Ship Building	3.48	3.27	6.4%	0.07

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ibsina Pharma	1.38	10.9%	-60.6%	52.57	Eastern Company	9.94	-0.6%	-7.3%	8.90
Citadel Capital - Common Shares	1.19	9.8%	-1.0%	27.95					
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Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.37	5.3%	-1.3%	5.08					
Orascom Development Egypt	3.83	4.9%	-36.2%	22.80					
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%	70.03	Eastern Company	9.94	9.75	1.9%	8.90
Alexandria Mineral Oils Company	3.91	4.48	-12.7%	18.38	Cleopatra Hospital Company	4.10	4.00	2.5%	33.58
Misr Fertilizers Production Company - Mopco	99.17	114.00	-13.0%	1.21	Telecom Egypt	13.48	12.77	5.6%	41.06
Egyptian Kuwaiti Holding-EGP	21.49	25.50	-15.7%	8.01	Abu Dhabi Islamic Bank- Egypt	10.90	10.31	5.8%	7.44
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.37	2.93	-19.1%	5.08	Oriental Weavers	6.69	6.30	6.2%	8.97

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	950.50	8.1%	7.0%	22061.710	Dr Reddys Lab	4374.00	-1.9%	-10.9%	2756.83
Bajaj Finance	6274.00	3.3%	-10.1%	8187.20	SBI Life Insurance	1170.00	-1.4%	-2.2%	1228.73
Tata Consumer products Ltd.	818.50	3.0%	10.1%	1819.36	Kotak Mahindra Bank	1805.00	-1.2%	0.5%	3942.27
UPL	706.05	2.9%	-5.5%	1924.95	Cipla	970.00	-1.2%	2.7%	1645.25
Larsen & Toubro	1763.10	2.6%	-7.0%	4947.74	Reliance Industries	2486.00	-0.7%	5.0%	18933.43
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Eicher Motors	3087.00	3111.00	-0.8%	1436.64	Hcl Technologies	924.55	877.35	5.4%	3229.03
ITC	299.45	302.20	-0.9%	4809.32	Wipro	413.35	391.00	5.7%	9330.84
Mahindra & Mahindra	1176.95	1195.00	-1.5%	2416.23	HDFC Life Insurance Company	529.75	497.05	6.6%	2909.78
Maruti Suzuki India	8820.00	9050.00	-2.5%	3694.43	Hdfc Bank	1363.00	1271.60	7.2%	8614.67
Hero Motocorp	2845.05	2954.45	-3.7%	892.25	Tata Consultancy Svs.	3178.95	2953.00	7.7%	7674.37

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	104.00	9.8%	19.2%	0.01	Bamburi Cement Limited	33.95	-3.0%	-10.7%	0.31
British American Tobacco Kenya Ltd	445.00	3.5%	0.8%	5.52	Nation Media Group	18.50	-1.3%	0.3%	0.08
Safaricom Plc	28.55	1.4%	-24.8%	108.01	Diamond Trust Bank Limited	49.00	-1.2%	-17.6%	0.37
Kenya Reinsurance Corporation Ltd	2.05	1.0%	-10.9%	0.07	The Cooperative Bank of Kenya Ltd	11.15	-0.9%	-13.9%	1.88
WPP Scangroup Plc	3.31	0.3%	-20.0%	0.01	Centum Investment Company Plc	9.94	-0.6%	-29.5%	0.07
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	104.00	108.00	-3.7%	0.01	Diamond Trust Bank Limited	49.00	48.00	2.1%	0.37
Standard Chartered Bank Kenya Ltd	131.75	148.75	-11.4%	3.41	Kengen Limited	3.50	3.35	4.5%	0.23
British American Tobacco Kenya Ltd	445.00	512.00	-13.1%	5.52	NCBA Group Plc	24.10	23.00	4.8%	2.28
Bamburi Cement Limited	33.95	40.00	-15.1%	0.31	Bamburi Cement Limited	33.95	32.00	6.1%	0.31
Total Kenya Ltd	23.00	27.50	-16.4%	0.02	Kenya Reinsurance Corporation Ltd	2.05	1.92	6.8%	0.07

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Alujain Holding Corp.	59.80	7.6%	10.7%	41.60	United Cooperative Assurance Co.	17.74	-10.0%	-47.7%	1.23
Development Works Food Co.	190.00	6.6%	-32.7%	38.11	Alinma Retail REIT Fund	5.40	-3.4%	-24.2%	14.68
Zahrat Al Waha for Trading	37.75	6.0%	-55.8%	21.30	Almunajem Foods	67.70	-3.2%	16.5%	33.98
Naseej International Trading Co	33.90	5.6%	18.5%	45.90	Al Moammar Info Systems Co.	93.90	-3.0%	-38.0%	11.09
Knowledge Economic City	13.28	4.7%	-17.8%	29.87	Al Abdullatif Industrial Investment	19.08	-2.7%	-35.4%	72.69
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.	172.00	172.00	0.0%	16.66	Alkhabeer REIT Fund	7.96	7.96	0.0%	75.18
Elm Co.	289.80	289.80	0.0%	114.11	Allied Cooperative Insurance Group	14.12	14.12	0.0%	1.88
Almunajem Foods Co.	67.70	67.70	0.0%	33.98	CHUBB Arabia Coop Insurance Co.	17.80	17.80	0.0%	19.81
Saudi Tadawul Group Holding Co.	200.40	200.40	0.0%	55.11	Gulf General Coop Insurance Co.	8.62	8.62	0.0%	5.93
ACWA POWER Co.	174.00	174.00	0.0%	245.48	Gulf Union Alahlia	8.86	8.86	0.0%	0.44

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Holdings Ltd	21093.00	3.5%	1.0%	60208.56	Anglo American Platinum Ltd	115312.00	-3.1%	-34.4%	86951.71
Nedbank Group Ltd	21611.00	3.1%	23.5%	39731.52	Exxaro Resources	19814.00	-2.8%	29.6%	14217.50
MultiChoice Group	12094.00	3.1%	-0.9%	7988.57	Glencore PLC	8502.00	-2.7%	4.8%	36759.51
Absa Group Ltd	16910.00	3.0%	10.8%	49841.04	Gold Fields Ltd	14879.00	-2.5%	-14.6%	66911.76
FirstRand Ltd	6576.00	2.9%	8.2%	51358.51	Anglo American PLC	52959.00	-2.1%	-17.9%	46355.60
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	22118.00	23636.00	-6.4%	24519.11	Anglo American Platinum Ltd	115312.00	112745.00	2.3%	86951.71
Investec PLC	8837.00	9684.15	-8.7%	8405.55	SPAR Group Ltd/The	13507.00	12909.00	4.6%	19386.73
MultiChoice Group	12094.00	13650.00	-11.4%	7988.57	Sibanye Stillwater	3875.00	3608.00	7.4%	39946.03
Bid Corp Ltd	31951.00	36098.00	-11.5%	19191.56	Northam Platinum	15373.00	14299.00	7.5%	22067.16
Investec Ltd	8700.00	9830.56	-11.5%	5276.98	Impala Platinum Holdings Ltd	15800.00	14680.00	7.6%	54646.04

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Mobile World Inv. Corp	64100.00	4.7%	-5.1%	320775.63	BaoViet Holdings	56700.00	-1.4%	1.3%	39792.06
Saigon Beer Alcohol Beverage Corp.	165000.00	3.3%	11.7%	36844.50	Vinhomes	58900.00	-1.3%	-26.1%	121964.23
Masan Group Corp	105500.00	2.4%	-25.4%	108970.95	Vietnam National Petroleum Group	42350.00	-1.2%	-21.4%	16774.84
Vietnam JSC Bank	27500.00	1.7%	-18.9%	132679.25	PetroVietnam Power Corp	13350.00	-1.1%	-23.7%	119656.05
Hoa Phat Group JSC	22700.00	1.6%	-35.4%	523085.18	Tien Phong Comm. Joint Stock Bank	28300.00	-0.5%	-31.1%	73976.20
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.	165000.00	181400.00	-9.0%	36844.50	Vinhomes	58900.00	57520.56	2.4%	121964.23
Phu Nhuan Jewelry	114000.00	130421.95	-12.6%	73712.40	No Va Land Invest	74200.00	72000.00	3.1%	138583.34
FPT Corp	85000.00	99083.29	-14.2%	153357.00	Vingroup JSC	68500.00	66200.00	3.5%	63746.10
Vietjet Aviation	126000.00	149000.00	-15.4%	60039.00	Vincom Retail	26300.00	25100.00	4.8%	52755.17
Asia Commercial JS Bank	24650.00	29480.00	-16.4%	106315.45	Vietcombank	72500.00	68900.00	5.2%	84433.50

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

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