

# Daily Market Report

## 25 July 2022

### JSE

JSE All-Share Index increased by 0.24% to close at 68,069.58 points on Friday, as the Resources sector recorded gains.

### BRVM

BRVM Composite Index closed at 207.10 points, down by 0.23% on Friday, with Sicom Côte d'Ivoire and Bank of Africa - Mali being the top losers.

### NSE

NSE All-Share Index decreased by 0.27% to close at 51,979.92 points on Friday, as the Banking, Industrial and Oil & Gas sectors recorded losses.

### EGX

EGX 30 Index was down by 0.15% to close at 9,276.28 points on Sunday, amid foreign selling.

### ESG

Casablanca ESG 10 Index decreased by 0.34% to close at 892.36 points on Friday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 0.24%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼ 0.23%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.27%
<b>EGX</b> Egyptian Stock Exchange	▼ 0.15%
<b>ESG</b> Casablanca Stock Exchange	▼ 0.34%

### African Markets

**Nigeria:** NSE 30 Index decreased by 0.32% and closed at 1,885.02 points on Friday. Lafarge Africa and Ecobank were the top losers.

**Egypt:** EGX 30 Index was down by 0.15% to close at 9,276.28 points on Sunday, amid foreign selling.

**Kenya:** NSE 20 Index increased marginally by 0.09% and closed at 1,676.51 points on Friday. East African Breweries and Stanbic Holdings were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.19% to close at 61,766.74 points on Friday, as the Resources sector recorded gains.

### Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.72
<b>INTERBANK RATES</b>	
OPR	14.83 ▲
Overnight	15.00 ↔

### Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.67% to close at 9,597.68 points on Friday, as gains in the Financials, Real Estate, and Consumer Staples sectors led shares higher. MSCI UAE inched down by 0.06% to close at 454.48 points.

**Vietnam:** VN-30 Index decreased by 0.52% to close at 1,228.84 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.91% to close at 775.09 points.

**Saudi Arabia:** Tadawul All Share Index was down by 0.11% to close at 11,975.14 points on Sunday, as losses in the Energy & Utilities, Media & Publishing and Financial Services sectors led shares lower. MSCI Saudi Arabia decreased by 0.17% to close at 1,659.19 points.

**India:** Nifty 50 Index increased by 0.69% to close at 16,719.45 points on Friday, as gains in the Banking, Green Energy and Carbon sectors led shares higher. MSCI India increased by 0.34% to close at 1,948.92 points.

### News

#### Nigeria:

Dangote eyes Africa's petrochemical hub with \$2bn plant  
Agric imports exceed exports by N443.35bn  
Sovereign Trust Insurance seeks N1.42b from shareholders

#### Kenya:

Minimum tax to go as Sh8bn levies kick in  
Kenya Airways to Get KSh103 Billion Bailout from Taxpayers  
Safaricom pays IFC Sh474m for Ethiopia entry transactions

#### Abu Dhabi:

Abu Dhabi property transactions exceed \$6.1bn in first half of 2022  
Borrowing rises as UAE growth outlook remains bright: Central Bank  
Abu Dhabi's Response Plus knits regional presence

#### Saudi Arabia:

Saudi retailer BinDawood to acquire majority stake in French TFI's subsidiary  
Saudi Investment Bank \$80m dividends for H1  
Saudi Arabia plans \$5bn investment in poultry meat production

#### Egypt:

EU grants Egypt €117.9M to support water, energy sectors  
Egypt, Jordan agree to set, activate joint action plan for food security  
Egypt's FRA seeks to double non-traditional financing by 2026

#### South Africa:

Amplats flags lacklustre interims as lower sales bite  
Kumba's flags earnings to decline by up to 53%  
Sars claims R931m in tax and penalties from Mirror Trading International

#### India:

RIL Q1 net profit surges 46% YoY to Rs 17,955 crore; revenue jumps 57%  
Infosys Q1 profit up 3.2% to Rs 5,360 cr; raises FY23 revenue outlook  
ICICI Bank Q1 net profit rises 49.6% YoY to Rs 6,905 crore

#### Vietnam:

VN, Korea to work together for trade, investment  
Việt Nam to become leader in global blockchain industry  
Hyundai, Kia record robust sales growth in Vietnam, Indonesia in H1

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,662.23	0.7%	0.0%	3.1%	13.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,276.28	-0.1%	-0.1%	0.5%	-22.1%	EGP/USD	18.92	-0.2%	20.4%
India	16,719.45	0.7%	0.0%	6.0%	-3.7%	INR/USD	79.85	-0.2%	7.4%
Kenya	1,676.51	0.1%	0.0%	3.9%	-11.9%	KES/USD	118.71	0.1%	4.9%
Nigeria	1,885.02	-0.3%	0.0%	-0.1%	9.4%	NGN/USD	423.46	-0.5%	2.3%
Saudi Arabia	11,975.14	-0.1%	-0.1%	3.9%	5.7%	SAR/USD	3.76	0.0%	0.1%
South Africa	61,766.74	0.2%	0.0%	2.8%	-7.9%	ZAR/USD	16.83	-1.6%	5.4%
Vietnam	1,228.84	-0.5%	0.0%	-1.6%	-20.0%	VND/USD	23,407.00	-0.1%	2.7%

## MSCI Emerging Markets

MSCI Frontier	514.45	-0.1%	0.0%	-0.6%	-22.7%	Brent Crude (\$)	103.20	-0.6%	32.7%
MSCI Frontier 100	1,200.70	-0.1%	0.0%	-0.1%	-21.7%	Gold (\$)	1,745.30	0.8%	-4.6%
MSCI Emerging	990.37	-0.03%	0.0%	-1.0%	-19.6%	Copper (\$)	7,452.50	1.8%	-23.3%
MSCI World (USD)	2,650.82	-0.5%	0.0%	4.1%	-18.0%	Coffee (\$)	190.74	-0.8%	-3.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	5.40	9.1%	14.9%	12.91	Lafarge Africa	24.10	-7.3%	1.7%	44.70
FBNH	11.20	0.4%	-2.6%	105.88	Ecobank	10.00	-5.7%	19.8%	3.31
Fidelity	3.10	0.3%	21.6%	28.71	Zenith	20.75	-5.5%	-17.0%	347.90
					Custodian	7.00	-4.1%	-10.3%	2.01
					Flour Mills	33.00	-2.9%	16.4%	605.85
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	3.99	3.99	0.0%	0.62	UBN	5.10	4.65	9.7%	1.94
UACN	11.20	11.20	0.0%	0.16	Cap	17.00	15.25	11.5%	0.35
Transcorp Hotels	6.25	6.25	0.0%	0.03	Guaranty	20.75	18.00	15.3%	755.36
Total	234.50	234.50	0.0%	3.24	Nascon	11.00	9.00	22.2%	0.44
Seplat Petroleum	1430.50	1430.50	0.0%	1.14	Stanbic IBTC	31.55	24.50	28.8%	13.58

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ADC acquisition corporation pjsc shares	12.18	8.6%	11.3%	5.41	Finance House	1.65	-9.8%	-17.5%	0.00
ADC acquisition corporation pjsc warrants	1.58	5.3%	110.7%	0.11	Gulf Medical Projects	1.90	-9.5%	11.8%	0.00
RAK Co. for White Cement & Construction	2.02	3.6%	18.8%	0.08	Ghitha holding P.J.S.C.	86.50	-2.7%	214.5%	47.92
Eshraq Investments	0.35	3.6%	-2.2%	6.28	Esg emirates stallions group P.J.S.C	6.35	-2.3%	-20.6%	9.41
Multiply Group PJSC	1.81	2.8%	-1.6%	68.58	Emirates Telecom	27.80	-1.9%	-12.3%	52.68
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	1.47	6.9%	-63.9%	39.60	Commercial Intl Bank(Egypt)	37.00	-1.9%	-30.2%	51.90
Credit Agricole Egypt	5.43	6.1%	-35.5%	3.57	Housing & Development Bank	33.00	-1.5%	-25.1%	1.90
MM Group For Industry And International Trade	2.32	4.0%	-66.3%	14.00	Orascom Development Egypt	3.78	-1.3%	-37.0%	1.11
Fawry For Banking Tech And E Payment	3.26	3.8%	-74.6%	53.63	Tenth Of Ramadan Pharma Ind & Diag Rameda	2.34	-1.3%	-2.5%	1.21
GB AUTO	3.03	2.7%	-40.6%	20.85	Alexandria Mineral Oils Company	3.87	-1.0%	-15.9%	0.02
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	2.91	3.00	-3.0%	26.35	Eastern Company	9.99	9.75	2.5%	1.51
Misr Fertilizers Production Company - Mopco	99.17	114.00	-13.0%	0.23	Cleopatra Hospital Company	4.18	4.00	4.5%	12.83
Alexandria Mineral Oils Company	3.87	4.48	-13.6%	3.47	Oriental Weavers	6.64	6.30	5.4%	2.18
Egyptian Kuwaiti Holding-EGP	21.30	25.50	-16.5%	0.79	Housing & Development Bank	33.00	31.01	6.4%	1.90
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.34	2.93	-20.1%	1.21	Telecom Egypt	13.61	12.77	6.6%	2.84

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Ultratech Cement	6431.20	4.9%	-15.3%	9138.339	Tata Consumer products Ltd.	803.00	-1.9%	8.0%	1414.19
Grasim Industries	1514.00	3.4%	-6.7%	2462.12	Infosys	1506.00	-1.8%	-20.2%	10584.32
UPL	725.10	2.9%	-2.9%	4189.42	NTPC	149.20	-1.1%	19.9%	1013.76
Hdfc Bank	1394.40	2.5%	-5.7%	8811.93	Power Grid Corp Of India	210.10	-1.0%	2.8%	1465.17
HDFC	2295.95	2.4%	-11.2%	6977.42	Bharat Petroleum	319.80	-0.9%	-17.0%	1009.49
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	4055.00	4091.00	-0.9%	1138.31	Hcl Technologies	918.40	877.35	4.7%	3225.51
Eicher Motors	3139.90	3179.00	-1.2%	4597.46	Wipro	410.60	391.00	5.0%	3183.12
Mahindra & Mahindra	1179.00	1195.00	-1.3%	2338.05	Tata Consultancy Svs.	3171.15	2953.00	7.4%	6573.21
Maruti Suzuki India	8830.00	9050.00	-2.4%	3672.18	HDFC Life Insurance Company	534.45	497.05	7.5%	1570.54
Hero Motocorp	2863.70	2954.45	-3.1%	1653.28	Tech Mahindra	1026.20	943.70	8.7%	3062.25

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	143.50	2.3%	-7.0%	0.83	Centum Investment Company Plc	9.58	-3.6%	-40.3%	1.44
Stanbic Holdings	106.00	1.9%	24.7%	0.01	Nation Media Group	18.05	-2.4%	16.8%	0.24
NCBA Group Plc	24.50	1.7%	-8.4%	0.45	Nairobi Securities Exchange Plc	7.74	-2.0%	-5.1%	0.02
Safaricom Plc	29.00	1.6%	-15.3%	192.82	Bamburi Cement Limited	33.35	-1.8%	-11.9%	0.75
Equity Group Holdings Plc	45.00	1.1%	23.1%	13.73	KCB Group Plc	38.50	-0.9%	1.0%	210.45
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	106.00	108.00	-1.9%	0.01	Diamond Trust Bank Limited	49.05	48.00	2.2%	2.34
Standard Chartered Bank Kenya Ltd	132.00	148.75	-11.3%	0.50	Bamburi Cement Limited	33.35	32.00	4.2%	0.75
British American Tobacco Kenya Ltd	445.00	512.00	-13.1%	4.18	Kengen Limited	3.50	3.35	4.5%	0.27
NCBA Group Plc	24.50	29.00	-15.5%	0.45	Centum Investment Company Plc	9.58	9.00	6.4%	1.44
Total Kenya Ltd	23.00	27.50	-16.4%	0.03	NCBA Group Plc	24.50	23.00	6.5%	0.45

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Salama Cooperative Insurance Co.	12.80	10.0%	-24.7%	12.50	United Cooperative Assurance Co.	15.98	-9.9%	-52.9%	50.42
Nayifat Finance Co.	27.20	9.9%	-13.5%	44.86	ACWA POWER Co.	169.00	-2.9%	101.2%	95.52
Amlak International for Real Estate Finance Co	18.70	6.4%	-11.6%	31.10	Saudia Dairy and Foodstuff Co.	157.00	-2.9%	-4.8%	9.91
Arab Sea Information System Co.	73.30	6.1%	-62.6%	212.62	Saudi Ceramic Co.	36.95	-2.4%	-32.9%	43.08
Jazan Energy and Development Co.	16.30	4.8%	-15.3%	19.37	National Co for Learning and Edu	55.30	-2.3%	-7.8%	7.26
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.	177.40	177.40	0.0%	39.12	Alkhabeer REIT Fund	7.81	7.81	0.0%	5.70
Elm Co.	290.00	290.00	0.0%	95.96	Allied Cooperative Insurance Group	14.28	14.28	0.0%	2.01
Almunajem Foods Co.	67.60	67.60	0.0%	14.42	CHUBB Arabia Coop Insurance Co.	18.00	18.00	0.0%	17.85
Saudi Tadawul Group Holding Co.	204.00	204.00	0.0%	63.32	Gulf General Coop Insurance Co.	8.77	8.77	0.0%	6.44
ACWA POWER Co.	169.00	169.00	0.0%	95.52	Gulf Union Alahlia	9.08	9.08	0.0%	1.50

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings	16910.00	8.4%	-24.8%	75587.70	Mondi	28917.00	-5.4%	-26.8%	29784.51
African Rainbow Minerals	22776.00	4.2%	-1.5%	10380.85	Reinet Invest	29794.00	-2.3%	4.2%	6857.09
AngloGold Ashanti	24743.00	4.0%	-24.7%	23537.52	Naspers	261000.00	-2.0%	5.6%	164500.47
Life Healthcare	1900.00	2.3%	-20.9%	20349.00	Firstrand	6450.00	-1.9%	6.1%	50826.00
Aspen Pharmacare Holdings	15539.00	2.3%	-30.8%	17248.29	Nedbank Group	21236.00	-1.7%	21.3%	37800.08
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	22346.00	23636.00	-5.5%	24804.06	SPAR Group Ltd/The	13796.00	12909.00	6.9%	4532.54
Investec PLC	8816.00	9684.15	-9.0%	4749.71	Anglo American Platinum Ltd	121100.00	112745.00	7.4%	78063.48
Investec Ltd	8609.00	9830.56	-12.4%	3200.83	Sibanye Stillwater	3984.00	3608.00	10.4%	86891.04
MultiChoice Group	11911.00	13650.00	-12.7%	6859.66	Impala Platinum Holdings Ltd	16910.00	14680.00	15.2%	75587.70
Bid Corp Ltd	31483.00	36098.00	-12.8%	15722.61	Northam Platinum	16900.00	14299.00	18.2%	27885.00

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Petrovietnam Gas	107800.00	3.6%	12.1%	116.416,20	Vingroup JSC	66500.00	-2.9%	-30.1%	45.466,49
Masan Group Corp	108500.00	2.8%	-36.5%	132.125,84	Bank for Inv. and Devp	35500.00	-2.7%	-4.3%	45.112,43
Techcombank	37100.00	0.7%	-25.8%	165.523,33	Hoa Phat Group JSC	22200.00	-2.2%	-52.2%	373.610,74
Mobile World Inv. Corp	64500.00	0.6%	-52.5%	354.719,73	Vietnam JSC Bank	26900.00	-2.2%	-20.6%	88.836,04
Saigon Beer Alcohol Beverage Corp.	166000.00	0.6%	9.9%	32.462,96	Saigon Securities Inc	20900.00	-1.9%	-59.7%	379.898,86
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietjet Aviation	125600.00	125600.00	0.0%	61.837,22	Hoa Phat Group JSC	22200.00	22200.00	0.0%	373.610,74
Vingroup JSC	66500.00	66500.00	0.0%	45.466,49	Khang Dien House Trading & Investment	36500.00	36500.00	0.0%	23.394,74
Phu Nhuan Jewelry	114500.00	114500.00	0.0%	39.316,72	Military Commercial Bank	25550.00	25550.00	0.0%	182.337,75
Masan Group Corp	108500.00	108500.00	0.0%	132.125,84	Vietnam National Petroleum Group	41800.00	41800.00	0.0%	19.824,23
Petrovietnam Gas	107800.00	107800.00	0.0%	116.416,20	Sai Gon Thuong Tin Commercial	23000.00	23000.00	0.0%	268.944,43

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