

Daily Market Report

27 July 2022

JSE

JSE All-Share Index increased by 0.99% to close at 68,421.81 points on Tuesday, as the Industrial, Financial and resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 208.33 points, down by 0.17% on Tuesday, with Bernabe Côte d'Ivoire and Sicom Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index dropped by 1.86% to close at 50,442.37 points on Tuesday, as the Banking, Insurance, Consumer goods, Oil & Gas and Industrial sector recorded losses.

EGX

EGX 30 Index rose by 1.22% to close at 9,350.42 points on Tuesday, as the market added around LE 5.45 billion to market cap, amid Egyptian and Arab purchases.

ESG

Casablanca ESG 10 Index was down by 0.12% to close at 882.79 points on Tuesday.

African Markets

Nigeria: NSE 30 Index fell by 2.19% and closed at 1,819.33 points on Tuesday. International Breweries and MTNN were the top losers.

Egypt: EGX 30 Index rose by 1.22% to close at 9,350.42 points on Tuesday, as the market added around LE 5.45 billion to market cap, amid Egyptian and Arab purchases.

Kenya: NSE 20 Index dropped by 1.27% and closed at 1,659.30 points on Tuesday. KCB Group and Kengen were the top losers.

South Africa: JSE Top 40 Index increased by 0.95% to close at 62,017.11 points on Tuesday, as the Industrial, Financial and resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.99%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.17%

NSE
Nigerian Stock Exchange ▼ 1.86%

EGX
Egyptian Stock Exchange ▲ 1.22%

ESG
Casablanca Stock Exchange ▼ 0.12%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.75
INTERBANK RATES	
OPR	15.00 ▲
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.41% to close at 9,550.14 points on Tuesday, as losses in the Telecom, Financials, Real Estate, Energy, and Basic Materials sectors led shares lower. MSCI UAE decreased by 0.47% to close at 445.09 points.

Vietnam: VN-30 Index decreased by 0.34% to close at 1,218.49 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.36% to close at 770.81 points.

Saudi Arabia: Tadawul All Share Index increased by 0.76% to close at 11,964.21 points on Tuesday, as gains in the Energy & Utilities, Media & Publishing and Financial Services sectors led shares higher. MSCI Saudi Arabia increased by 0.72% to close at 1,653.87 points.

India: Nifty 50 Index decreased by 0.88% to close at 16,483.85 points on Tuesday, as losses in the IT, Technology and Fast Moving Consumer Goods sectors led shares lower. MSCI India declined by 1.10% to close at 1,917.77 points.

News

Nigeria:

FAAC allocation rises 18%, FG, states share N802bn
IFC okays \$9.4b for Africa's private sector
U.S. IFDC votes \$280million for Access Bank

Kenya:

Centum raises dividend to Sh391 million amid losses
Dealers hit as wholesale fuel prices removed
Kenya Airways Signs an Interline Agreement with Virgin Atlantic

Abu Dhabi:

RAKBank net profit up 72.4% at Dh527.4m in H1 2022
UAE's Adnoc Buys ZMI Holdings in Offshore Oil and Wind Push
Abu Dhabi's Ruya invests \$20m in Saudi power company Energia

Saudi Arabia:

Saudi trade balance surplus in May at highest since 2017 on oil sales jump
Saudi Arabia set to launch \$80bn Neom Investment Fund
Saudi retailer BinDawood acquires 62% of app developer IATC

Egypt:

IMF maintains Egypt's growth rate at 5.9% in 2022, lowers it to 4.8% in 2023
Egypt targets upping foreign investments of startups to \$850M by end of 2022
Orascom okays Chimera's acquisition of majority stake in Beltone Financial Holding

South Africa:

Fibre optic rollout gets a R5bn leg-up from Standard Bank
Woolworths annual sales helped by second-half improvement
Kumba Iron Ore half-year profit falls 50%

India:

5G spectrum sales net record Rs 1.45 lakh crore on Day 1
L&T cuts biz verticals to 7 from 9, reduces costs
IMF sees India's FY23 growth slowing to 7.4%

Vietnam:

Vietnam grosses 29.17 bn USD from phone and component exports
Vietnamese companies agree deal for Laos hydropower project
Vietcombank posts H1 profit of over 740 million USD

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,550.14	-0.4%	-1.2%	1.9%	12.5%	AED/USD	3.67	0.0%	0.0%
Egypt	9,350.42	1.2%	0.7%	1.4%	-21.5%	EGP/USD	18.95	0.1%	20.6%
India	16,483.85	-0.9%	-1.4%	4.5%	-5.0%	INR/USD	79.78	0.1%	7.3%
Kenya	1,659.30	-1.3%	-1.0%	2.9%	-12.8%	KES/USD	118.60	-0.1%	4.8%
Nigeria	1,819.33	-2.2%	-3.5%	-3.6%	5.6%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	11,964.21	0.8%	-0.2%	3.8%	5.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	62,017.11	1.0%	0.4%	3.2%	-7.5%	ZAR/USD	16.92	0.6%	6.0%
Vietnam	1,218.49	-0.3%	-0.8%	-2.4%	-20.7%	VND/USD	23,355.00	-0.1%	2.5%

MSCI Emerging Markets

MSCI Frontier	513.08	-0.3%	-0.3%	-0.8%	-22.9%	Brent Crude (\$)	104.40	-0.7%	34.2%
MSCI Frontier 100	1,196.61	-0.4%	-0.3%	-0.4%	-22.0%	Gold (\$)	1,735.70	-0.1%	-5.1%
MSCI Emerging	989.92	0.3%	-0.05%	-1.1%	-19.6%	Copper (\$)	7,536.50	0.8%	-22.5%
MSCI World (USD)	2,624.49	-1.0%	-1.0%	3.1%	-18.8%	Coffee (\$)	187.21	0.2%	-5.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	11.15	1.4%	-3.0%	108.17	International Breweries	5.00	-9.9%	6.4%	46.43
Sterling	1.53	1.3%	2.0%	8.08	MTNN	192.50	-9.6%	5.8%	576.54
					P Z Cussons	9.40	-9.6%	54.1%	4.73
					United Capital PLC	11.00	-8.3%	11.1%	26.92
					Transnational Corporation	1.06	-7.8%	7.1%	16.35
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%	0.01	Access	8.90	8.90	0.0%	37.27
Seplat Petroleum	1430.50	1430.50	0.0%	182.71	Nascon	11.00	11.00	0.0%	1.69
Okomu Oil	216.90	216.90	0.0%	1.93	Stanbic IBTC	31.55	31.55	0.0%	2.44
Airtel Africa	1905.40	1905.40	0.0%	313.00	UBA	7.00	7.00	0.0%	43.44
Wema	3.99	4.00	-0.2%	2.34	Nestle	1400.00	1390.00	0.7%	25.20

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	9.7%	0.6%	0.02	Gfh Financial Group B.S.C	1.07	-5.3%	-8.5%	0.63
CHIMERA S&P KSA SHARIAH ETF-SHARE CLASS B-INCOME	3.70	2.8%	0.0%	0.00	Eshraq Investments	0.34	-3.2%	-5.3%	1.79
Sharjah Islamic Bank	1.77	1.7%	-9.2%	12.33	Ghitha Holding P.J.S.C.	86.90	-2.4%	216.0%	47.60
ALPHA DHABI HOLDING PJSC	24.36	1.4%	-10.8%	143.28	Emirates Telecom	26.64	-1.7%	-16.0%	49.80
Multiply Group PJSC	1.81	1.1%	-1.6%	85.10	Invictus Investment Co	3.93	-1.5%	-2.5%	7.06
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	Arkan Building Materials	1.17	1.14	2.6%	2.39
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	3.50	3.27	7.0%	0.07

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Abu Dhabi Islamic Bank-Egypt	11.96	4.8%	-16.8%	10.29	Ibsina Pharma	1.53	-2.4%	-56.2%	25.80
E-finance For Digital and Financial Investments	13.50	4.8%	-33.5%	7.88	MM Group For Industry And International Trade	2.60	-1.5%	-62.2%	49.69
Egyptian Financial Group-Hermes Holding Company	11.78	4.2%	-4.6%	45.66	Eastern Company	9.90	-1.0%	-7.6%	28.38
Citadel Capital - Common Shares	1.22	3.6%	1.2%	6.68	Medinet Nasr Housing	2.84	-0.7%	11.4%	33.03
Tenth Of Ramadan Pharma Industries & Diagnostic	2.35	3.1%	-2.1%	9.10	Cairo For Investment And Real Estate Development	10.93	-0.6%	-19.7%	13.46
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	2.84	3.00	-5.3%	33.03	Eastern Company	9.90	9.75	1.5%	28.38
Misr Fertilizers Production Company - Mopco	100.00	114.00	-12.3%	9.55	Oriental Weavers	6.68	6.30	6.0%	42.28
Alexandria Mineral Oils Co	3.86	4.48	-13.8%	4.98	Cleopatra Hospital	4.26	4.00	6.5%	16.10
Egyptian Kuwaiti Holding-EGP	21.39	25.50	-16.1%	12.26	Housing & Development Bank	33.21	31.01	7.1%	3.82
Tenth Of Ramadan Pharma Industries & Diagnostic-	2.35	2.93	-19.8%	9.10	Telecom Egypt	13.70	12.77	7.3%	22.12

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finserv	13292.05	5.3%	-19.0%	17514.912	Infosys	1450.85	-3.5%	-23.1%	10619.53
Jsw Steel	595.80	1.8%	-9.2%	3568.00	HUL	2542.80	-3.1%	7.7%	4329.40
Grasim Industries	1515.00	1.1%	-6.6%	1322.13	Axis Bank	706.40	-2.9%	4.1%	10060.41
Bharti Airtel	683.00	0.7%	-0.1%	3411.45	Dr Reddys Lab	4212.00	-2.7%	-14.2%	2508.12
Power Grid Corp Of India	209.20	0.6%	2.3%	1793.53	Kotak Mahindra Bank	1753.00	-2.4%	-2.4%	3185.30
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Coal India	201.90	209.00	-3.4%	2589.94	Wipro	405.10	391.00	3.6%	3096.26
Bajaj Auto	3932.00	4091.00	-3.9%	3503.35	Hcl Technologies	913.70	877.35	4.1%	2548.77
Mahindra & Mahindra	1136.00	1195.00	-4.9%	2957.46	HDFC Life Insurance Company	522.95	497.05	5.2%	4105.95
Eicher Motors	3021.00	3179.00	-5.0%	2066.51	Tata Consultancy Svs.	3118.00	2953.00	5.6%	8243.09
Hero Motocorp	2799.65	2954.45	-5.2%	976.37	Tech Mahindra	999.65	943.70	5.9%	5990.30

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	18.80	4.2%	1.9%	0.00	KCB Group Plc	38.50	-0.9%	-15.3%	0.14
The Cooperative Bank of Kenya Ltd	11.50	1.3%	-11.2%	0.00	Kengen Limited	3.48	-0.6%	-16.9%	0.07
WPP Scangroup Plc	3.35	1.2%	-19.1%	0.01	Bamburi Cement Limited	33.35	-0.4%	-12.2%	0.03
Kenya Reinsurance Corporation Ltd	2.05	1.0%	-10.9%	0.02	Centum Investment Company Plc	9.90	-0.4%	-29.8%	0.01
Equity Group Holdings Plc	45.30	0.2%	-14.1%	0.05					
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	99.25	108.00	-8.1%	0.00	Diamond Trust Bank Limited	49.70	48.00	3.5%	0.00
Standard Chartered Bank Kenya Ltd	135.25	148.75	-9.1%	0.00	Kengen Limited	3.48	3.35	3.9%	0.07
British American Tobacco Kenya Ltd	442.25	512.00	-13.6%	0.00	Bamburi Cement Limited	33.35	32.00	4.2%	0.03
NCBA Group Plc	24.60	29.00	-15.2%	0.00	Kenya Reinsurance Corporation Ltd	2.05	1.92	6.8%	0.02
Total Kenya Ltd	23.00	27.50	-16.4%	0.00	NCBA Group Plc	24.60	23.00	7.0%	0.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Development Works Food	204.60	10.0%	-27.5%	127.43	United Cooperative Assurance Co.	12.96	-10.0%	-61.8%	26.87
Tourism Enterprise Co.	191.40	5.8%	12.6%	110.97	Salama Cooperative Insurance Co.	12.62	-3.5%	-25.8%	6.51
ACWA POWER Co.	172.80	5.4%	105.7%	183.42	Baazeem Trading	65.70	-3.4%	-41.7%	35.58
Saudi Steel Pipe Co.	21.54	4.8%	-14.5%	10.18	Arabia Insurance Cooperative Co.	13.50	-3.3%	-65.9%	23.24
Dallah Healthcare Co.	119.40	4.2%	59.0%	25.16	Astra Industrial Group	42.30	-3.2%	6.3%	20.50
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%	16.30	Alkhabeer REIT Fund	7.70	7.70	0.0%	7.82
Elm Co.	291.00	291.00	0.0%	59.99	Allied Cooperative Insurance Group	14.16	14.16	0.0%	2.53
Saudi Tadawul Group Holding Co.	204.40	204.40	0.0%	93.15	CHUBB Arabia Coop Insurance Co.	18.00	18.00	0.0%	8.08
ACWA POWER Co.	172.80	172.80	0.0%	183.42	Gulf General Coop Insurance Co.	8.85	8.85	0.0%	5.80
Theeb Rent a Car Co	65.20	65.20	0.0%	5.31	Gulf Union Alahlia	9.02	9.02	0.0%	1.04

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	21922.00	4.7%	5.0%	33637.45	Clicks Group Ltd	27977.00	-1.0%	-11.3%	14021.23
AngloGold Ashanti Ltd	24298.00	3.7%	-26.1%	20478.31	Mondi PLC	29030.00	-0.7%	-26.5%	12024.31
Anglo American Platinum Ltd	122069.00	3.0%	-30.6%	25935.27	Prosus NV	114644.00	-0.5%	-12.5%	72221.82
Gold Fields Ltd	14922.00	2.9%	-14.3%	18408.26	Cie Financiere Richemont SA	18828.00	-0.2%	-22.0%	33919.11
Impala Platinum Holdings Ltd	17579.00	2.8%	-21.9%	44598.98	Bidvest Group	21550.00	-0.1%	13.8%	7436.86
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	21550.00	23636.00	-8.8%	7436.86	Clicks Group Ltd	27977.00	26013.00	7.6%	14021.23
Investec PLC	8700.00	9684.15	-10.2%	4294.85	Old Mutual Ltd	1145.00	1063.00	7.7%	12650.16
Shoprite Holdings Ltd	21922.00	24723.00	-11.3%	33637.45	SPAR Group Ltd/The	13947.00	12909.00	8.0%	10865.05
MultiChoice Group	12058.00	13650.00	-11.7%	3561.90	Anglo American Platinum Ltd	122069.00	112745.00	8.3%	25935.27
Investec Ltd	8672.00	9830.56	-11.8%	5172.54	Sibanye Stillwater	3917.00	3608.00	8.6%	38702.53

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	37050.00	2.1%	-20.1%	42922.43	BaoViet Holdings	54400.00	-1.8%	-2.9%	51984.64
Saigon Beer Alcohol Beverage Corp.	167700.00	1.6%	13.5%	27687.27	Vingroup JSC	66100.00	-1.8%	-30.5%	39177.47
Vietcombank	73900.00	1.4%	-6.2%	82753.22	Tien Phong Comm Joint Stock Bank	27000.00	-1.5%	-34.2%	34055.10
Masan Group Corp	110000.00	1.3%	-22.2%	53614.00	Vinamilk	72000.00	-1.2%	-12.4%	83088.00
Sai Gon Thuong Tin Commercial	22950.00	0.4%	-27.1%	212969.12	Vietnam Rubber Group JSC	21650.00	-1.1%	-38.3%	571088.03
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.	167700.00	181400.00	-7.6%	27687.27	Vingroup JSC	66100.00	66100.00	0.0%	39177.47
Phu Nhuan Jewelry	112000.00	130421.95	-14.1%	35537.60	Vinhomes	58700.00	57520.56	2.1%	43267.77
FPT Corp	84800.00	99083.29	-14.4%	95722.24	No Va Land Invest	73900.00	72000.00	2.6%	81496.92
Vietjet Aviation	125100.00	149000.00	-16.0%	53505.27	Vincom Retail	26050.00	25100.00	3.8%	14345.74
Vinamilk	72000.00	87859.93	-18.1%	83088.00	Vietnam Prosperity	27700.00	26500.00	4.5%	205503.53

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