

Daily Market Report

28 July 2022

JSE

JSE All-Share Index inched up by 0.005% to close at 68,425.00 points on Wednesday, as the Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 210.39 points, up by 0.99% on Wednesday, with Oragroup Togo and Nestle Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 0.50% to close at 50,188.55 points on Wednesday, as the Banking, Insurance, Oil & Gas and Industrial sector recorded losses.

EGX

EGX 30 Index decreased by 0.67% to close at 9,287.92 points on Wednesday, amid Egyptian and Arab selling.

ESG

Casablanca ESG 10 Index decreased by 0.30% to close at 880.11 points on Wednesday.

African Markets

Nigeria: NSE 30 Index decreased by 0.56% and closed at 1,809.12 points on Wednesday. Custodian and United Capital were the top losers.

Egypt: EGX 30 Index decreased by 0.67% to close at 9,287.92 points on Wednesday, amid Egyptian and Arab selling.

Kenya: NSE 20 Index climbed by 1.02% and closed at 1,676.18 points on Tuesday. Centum Investment Company and The Cooperative Bank of Kenya were the top gainers.

South Africa: JSE Top 40 Index slipped by 0.05% to close at 61,985.48 points on Wednesday, as the Industrial sector recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▲ 0.005%

BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.99%

NSE

Nigerian Stock Exchange

▼ 0.50%

EGX

Egyptian Stock Exchange

▼ 0.67%

ESG

Casablanca Stock Exchange

▼ 0.30%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 416.14
INTERBANK RATES	
OPR	14.75 ▼
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.26% to close at 9,575.21 points on Wednesday, as gains in the Telecom, Real Estate, Energy, Utilities, and Basic Materials sectors led shares higher. MSCI UAE increased by 0.94% to close at 449.25 points.

Vietnam: VN-30 Index edged up by 0.08% to close at 1,219.43 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.25% to close at 772.75 points.

Saudi Arabia: Tadawul All Share Index increased by 0.74% to close at 12,052.18 points on Wednesday, as gains in the Petrochemicals, Retail and Hotels & Tourism sectors led shares higher. MSCI Saudi Arabia increased by 0.67% to close at 1,664.91 points.

India: Nifty 50 Index increased by 0.96% to close at 16,641.80 points on Wednesday, as gains in the Healthcare, Capital Goods and Public Sector Undertakings sectors led shares higher. MSCI India increased by 0.99% to close at 1,936.73 points.

News

Nigeria:

Exporters, Investors Total FX Trade Up 17.6% to N30trn in H1
OCP Africa, NSIA vote \$1.4b for industrial plant project
Presco Shareholders Gets N7.5bn Dividend for FY21

Kenya:

EABL pays Sh7.25 more in final dividend after doubling net profit
KenGen to branch into fertiliser production
KQ to access Sh36 billion bailout based on targets

Abu Dhabi:

UAE matches US rate hike by 0.75%
Adnoc Drilling secures contracts worth \$2bn for Hail and Ghasha gas project
ADX tops Arab region in market value increase: Report

Saudi Arabia:

Saudi retailer BinDawood to acquire 80.5% stake in French TFI's subsidiary
Saudi lender Arab National Bank reports higher H1 profit of \$360m
Greece, Saudi Arabia seal deal on data cable, discuss power grid link

Egypt:

Egypt and India sign MoU to build a green hydrogen factory worth \$8 bln
AfDB projects 5.7% increase for Egypt's economy in 2022
Cabinet discusses opportunities to boost joint Egyptian-Qatari investments

South Africa:

Ramaphosa's energy interventions get the nod from industry heavyweights
Transnet swings from over R8bn FY loss to a R5bn profit
Kumba delivers interim dividend amid falling production volumes

India:

BSNL, MTNL get fresh lifeline of Rs 1.6 lakh crore
5G spectrum auction extends 3rd day; receives bids of Rs 1.49 lakh cr on day 2
Tata Steel inks pact with Bengaluru drone firm for mine management

Vietnam:

Standard Chartered forecasts Vietnam's economic growth at 6.7% in 2022
Vietnam firm to build \$1.5 billion polypropylene plant
Shipping route connecting central Vietnam, India inaugurated

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,575.21	0.3%	-0.9%	2.1%	12.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,287.92	-0.7%	-0.02%	0.7%	-22.0%	EGP/USD	18.94	0.0%	20.6%
India	16,641.80	1.0%	-0.5%	5.5%	-4.1%	INR/USD	79.90	0.2%	7.5%
Kenya	1,676.18	1.0%	-0.02%	3.9%	-11.9%	KES/USD	118.75	0.1%	4.9%
Nigeria	1,809.12	-0.6%	-4.0%	-4.2%	5.0%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,052.18	0.7%	0.5%	4.6%	6.4%	SAR/USD	3.76	0.0%	0.0%
South Africa	61,985.48	-0.1%	0.4%	3.1%	-7.6%	ZAR/USD	16.86	-0.3%	5.6%
Vietnam	1,219.43	0.1%	-0.8%	-2.4%	-20.6%	VND/USD	23,380.00	0.1%	2.6%

MSCI Emerging Markets

MSCI Frontier	515.46	0.5%	0.2%	-0.4%	-22.6%	Brent Crude (\$)	106.62	2.1%	37.1%
MSCI Frontier 100	1,201.40	0.4%	0.1%	-0.02%	-21.6%	Gold (\$)	1,737.50	0.1%	-5.0%
MSCI Emerging	989.89	-0.004%	-0.05%	-1.1%	-19.7%	Copper (\$)	7,637.00	1.3%	-21.4%
MSCI World (USD)	2,675.09	1.9%	0.9%	5.1%	-17.2%	Coffee (\$)	189.07	1.0%	-4.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.10	3.3%	4.0%	15.91	Custodian	6.30	-10.0%	-19.2%	29.95
Nascon	11.10	0.9%	-15.9%	4.31	Wema	3.60	-9.8%	355.7%	5.09
Nigerian Breweries	47.70	0.4%	-0.6%	180.56	United Capital PLC	10.00	-9.1%	1.0%	45.01
					Cap	17.00	-9.1%	-12.6%	18.17
					Sterling	1.45	-5.2%	-3.3%	10.10
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	Access	8.50	8.50	0.0%	60.88
Seplat Petroleum	1430.50	1430.50	0.0%	116.03	Cap	17.00	17.00	0.0%	18.15
Okomu Oil	216.90	216.90	0.0%	0.62	Stanbic IBTC	31.55	31.55	0.0%	4.48
Airtel Africa	1905.40	1905.40	0.0%	50.10	Zenith	20.60	20.50	0.5%	191.11
Cadbury	17.10	17.85	-4.2%	20.07	Nestle	1400.00	1390.00	0.7%	32.03

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
United Arab Bank	0.73	12.1%	8.5%	0.04	Fujairah Cement Industries	0.45	-6.3%	-23.1%	0.01
RAK Co. for White Cement & Construction	0.00	7.7%	-100.0%	0.01	Abu Dhabi Natrl for Building Materials	0.16	-4.1%	-34.1%	0.00
National Bank of Ras Al Khaimah	4.80	6.7%	6.7%	0.49	Ghitha Holding P.J.S.C.	85.50	-2.2%	210.9%	44.24
Finance House	1.84	4.0%	-8.0%	0.02	National Marine Dredging	27.48	-1.6%	110.7%	44.51
ESG EMIRATES STALLIONS GROUP P.J.S.C	6.44	3.5%	-19.5%	12.12	Easylease motorcycle rentals	39.80	-1.5%	37.2%	14.60
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	1.39	1.37	1.5%	0.23
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.17	1.14	2.6%	0.20
United Arab Bank	0.73	0.73	0.0%	0.04	Sharjah Cement	0.60	0.58	4.0%	0.05
Sharjah Insurance	1.38	1.38	0.0%	0.00	Abu Dhabi Ship Building	3.49	3.27	6.7%	0.04

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Tenth Of Ramadan Pharma Industries & Diagnostic	2.40	2.1%	0.0%	15.28	MM Group For Ind And Intl Trade	2.48	-4.6%	-64.0%	18.45
Ezz Steel	11.90	1.4%	-20.6%	10.57	Fawry For Banking Tech And E Payment	3.11	-4.0%	-55.2%	54.06
E-finance For Digital and Financial Investments	13.64	1.0%	-32.8%	10.66	GB AUTO	2.90	-3.7%	-43.1%	16.13
Abu Dhabi Islamic Bank-Egypt	12.05	0.8%	-16.2%	6.92	Citadel Capital - Common Shares	1.19	-2.5%	-1.4%	4.41
Egyptian Kuwaiti Holding-EGP	21.49	0.5%	9.4%	8.91	Misr Fertilizers Production Co	97.60	-2.4%	0.1%	3.36
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	2.78	3.00	-7.3%	24.56	Eastern Company	9.85	9.75	1.0%	19.00
Misr Fertilizers Production Company	97.60	114.00	-14.4%	3.36	Oriental Weavers	6.60	6.30	4.8%	6.93
Alexandria Mineral Oils Company	3.83	4.48	-14.5%	1.70	Cleopatra Hospital Company	4.23	4.00	5.8%	3.10
Egyptian Kuwaiti Holding-EGP	21.49	25.50	-15.7%	8.91	Housing & Development Bank	32.80	31.01	5.8%	0.69
Tenth Of Ramadan Pharma Industries & Diagnostic	2.40	2.93	-18.1%	15.28	Telecom Egypt	13.53	12.77	6.0%	6.19

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Sun Pharma Industries	895.20	3.2%	5.9%	2478.645	Bharti Airtel	675.00	-1.3%	-1.3%	4217.00
State Bank Of India	528.35	2.8%	14.7%	7885.42	Bajaj Auto	3882.65	-1.1%	19.5%	1996.46
Divi's Laboratories Limited	3784.00	2.6%	-19.1%	1917.69	HDFC Life Insurance Company	520.80	-0.3%	-19.8%	4557.42
Larsen & Toubro	1795.40	2.5%	-5.3%	9666.26	Kotak Mahindra Bank	1756.00	-0.3%	-2.2%	6069.44
Tata Consultancy Svs.	3188.00	2.3%	-14.7%	4389.29					
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	202.90	209.00	-2.9%	1493.68	Wipro	407.20	391.00	4.1%	2856.97
State Bank Of India	528.35	549.00	-3.8%	7885.42	HDFC Life Insurance Company	520.80	497.05	4.8%	4557.42
Eicher Motors	3056.60	3179.00	-3.9%	1605.72	Hcl Technologies	928.50	877.35	5.8%	1609.06
Maruti Suzuki India	8650.00	9050.00	-4.4%	11137.02	Tech Mahindra	1007.25	943.70	6.7%	2554.35
Mahindra & Mahindra	1137.00	1195.00	-4.9%	1869.75	Infosys	1468.20	1367.15	7.4%	6599.21

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	8.50	6.3%	-39.7%	17.73	Kenya Reinsurance Corporation Ltd	2.00	-2.4%	-13.0%	0.50
The Cooperative Bank of Kenya Ltd	11.50	4.5%	-11.2%	18.67	Bamburi Cement Limited	33.05	-2.2%	-13.0%	3.13
British American Tobacco Kenya Ltd	444.75	3.4%	0.7%	1.69	Standard Chartered Bank Kenya Ltd	133.00	-1.7%	3.7%	12.49
Equity Group Holdings Plc	46.50	2.2%	-11.8%	102.17	KCB Group Plc	39.05	-1.5%	-14.1%	81.32
Kenya Power & Lighting Limited	1.43	2.1%	-18.3%	0.32	Diamond Trust Bank Limited	49.35	-0.7%	-17.1%	1.01
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%	0.04	Diamond Trust Bank Limited	49.35	48.00	2.8%	1.01
Standard Chartered Bank Kenya Ltd	133.00	148.75	-10.6%	12.49	Bamburi Cement Limited	33.05	32.00	3.3%	3.13
British American Tobacco Kenya Ltd	444.75	512.00	-13.1%	1.69	Kenya Reinsurance Corporation Ltd	2.00	1.92	4.2%	0.50
NCBA Group Plc	24.80	29.00	-14.5%	1.08	Kengen Limited	3.50	3.35	4.5%	3.36
Equity Group Holdings Plc	46.50	55.00	-15.5%	102.17	Centum Investment Company Plc	8.50	8.00	6.3%	17.73

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Advanced Petrochemical Co.	48.95	5.5%	-30.5%	50.06	United Cooperative Assurance Co.	11.68	-9.9%	-65.6%	11.13
Saudi Tadawul Group Holding Co.	213.00	4.2%	69.3%	229.96	Red Sea International Co.	25.60	-9.5%	21.2%	17.78
Leejam Sports Co.	107.80	3.9%	-1.1%	37.28	Salama Cooperative Insurance Co.	12.18	-3.5%	-28.4%	5.74
Jarir Marketing Co.	159.20	3.7%	-19.1%	28.99	Amana Cooperative Insurance Co.	11.90	-3.4%	-65.4%	25.65
Saudi Vitrified Clay Pipes Co.	50.40	2.5%	-34.5%	5.96	Walaa Cooperative Insurance Co.	13.42	-3.3%	-29.3%	6.97
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.	169.80	169.80	0.0%	14.92	Alkhabeer REIT Fund	7.69	7.69	0.0%	5.40
Elm Co.	292.40	292.40	0.0%	61.79	Allied Cooperative Insurance Group	14.10	14.10	0.0%	1.10
Saudi Tadawul Group Holding Co.	213.00	213.00	0.0%	229.96	CHUBB Arabia Coop Insurance Co.	18.02	18.02	0.0%	7.48
ACWA POWER Co.	173.40	173.40	0.0%	153.18	Gulf General Coop Insurance Co.	8.64	8.64	0.0%	2.89
Arabian Internet and Communications Services Co.	237.00	237.00	0.0%	31.30	Gulf Union Alahlia	8.90	8.90	0.0%	0.77

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mondi PLC	30185.00	4.0%	-23.6%	12144.63	Naspers Ltd	247285.00	-3.1%	0.0%	185061.17
Anglo American Platinum Ltd	124587.00	2.1%	-29.2%	33795.35	Prosus NV	111900.00	-2.4%	-14.6%	101216.57
Shoprite Holdings Ltd	22374.00	2.1%	7.1%	37951.67	SPAR Group Ltd/The	13676.00	-1.9%	-18.2%	15657.11
Bid Corp Ltd	31044.00	1.8%	-4.9%	26831.95	British American Tobacco PLC	70035.00	-1.2%	19.5%	56670.43
Cie Financiere Richemont SA	19065.00	1.3%	-21.0%	36538.36	Exxaro Resources	19767.00	-1.2%	29.3%	47625.31
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	8792.00	9684.15	-9.2%	3642.93	SPAR Group Ltd	13676.00	12909.00	5.9%	15657.11
Bidvest Group Ltd/The	21408.00	23636.00	-9.4%	14241.22	Old Mutual Ltd	1144.00	1063.00	7.6%	7672.45
Shoprite Holdings Ltd	22374.00	24723.00	-9.5%	37951.67	Clicks Group Ltd	28137.00	26132.00	7.7%	15702.42
MultiChoice Group	12150.00	13650.00	-11.0%	7965.21	Sibanye Stillwater	3888.00	3608.00	7.8%	22908.58
Investec Ltd	8738.00	9830.56	-11.1%	4672.10	Sanlam Ltd	5489.00	5065.00	8.4%	18692.96

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	57200.00	5.1%	2.1%	86543.60	Vietnam Rubber Group JSC	21250.00	-1.8%	-39.5%	607771.25
Vietnam JSC Bank	27000.00	1.7%	-20.4%	43151.40	Hoa Phat Group JSC	21250.00	-1.8%	-39.5%	607771.25
Vietcombank	75000.00	1.5%	-4.8%	94492.50	Mobile World Inv. Corp	62100.00	-1.4%	-8.0%	115897.23
Ho Chi Minh City Devp	23900.00	1.3%	-22.5%	16555.53	Military Commercial Bank	24900.00	-1.0%	-13.8%	142953.39
Vietnam National Petroleum Group	41300.00	1.1%	-23.4%	14463.26	No Va Land Invest	73700.00	-0.3%	-19.0%	133153.79
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%	19570.59	Vingroup JSC	66500.00	66000.00	0.8%	38663.10
Phu Nhuan Jewelry	112200.00	130421.95	-14.0%	31977.00	Vinhomes	58600.00	57520.56	1.9%	29464.08
FPT Corp	85200.00	99083.29	-14.0%	65697.72	No Va Land Invest	73700.00	72000.00	2.4%	133153.79
Vietjet Aviation	125300.00	149000.00	-15.9%	55031.76	Vietnam Rubber Group JSC	21250.00	20500.00	3.7%	607771.25
Vinamilk	72200.00	87859.93	-17.8%	57001.90	Hoa Phat Group JSC	21250.00	20500.00	3.7%	607771.25

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