

Daily Market Report

29 July 2022

JSE

JSE All-Share Index increased by 0.27% to close at 68,610.75 points on Thursday, as the Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 210.41 points, up marginally by 0.01% on Thursday, with Bernabe Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 1.04% to close at 49,667.14 points on Thursday, as the Consumer goods, Banking, Insurance, and Industrial sectors recorded losses.

EGX

EGX 30 Index increased by 0.88% to close at 9,369.32 points on Thursday, as the market gained LE 3.6 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.32% to close at 882.93 points on Thursday.

African Markets

Nigeria: NSE 30 Index declined by 1.12% and closed at 1,788.85 points on Thursday. Stanbic IBTC and Nestle were the top losers.

Egypt: EGX 30 Index increased by 0.88% to close at 9,369.32 points on Thursday, as the market gained LE 3.6 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.33% and closed at 1,681.71 points on Thursday. Centum Investment Company and East African Breweries were the top gainers.

South Africa: JSE Top 40 Index increased by 0.30% to close at 62,169.99 points on Thursday, as the Financial and Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.27%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.01%

NSE
Nigerian Stock Exchange ▼ 1.04%

EGX
Egyptian Stock Exchange ▲ 0.88%

ESG
Casablanca Stock Exchange ▲ 0.32%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 415.96
INTERBANK RATES	
OPR	15.00 ▲
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index was down by 0.11% to close at 9,564.26 points on Thursday, as losses in the Telecom, Financials, and Consumer Discretionary sectors led shares lower. MSCI UAE was down by 0.13% to close at 448.65 points.

Vietnam: VN-30 Index climbed by 1.37% to close at 1,236.14 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam advanced by 1.41% to close at 783.64 points.

Saudi Arabia: Tadawul All Share Index increased by 0.85% to close at 12,155.02 points on Thursday, as gains in the Industrial Investment, Hotels & Tourism and Retail sectors led shares higher. MSCI Saudi Arabia increased by 0.85% to close at 1,679.03 points.

India: Nifty 50 Index jumped by 1.73% to close at 16,929.60 points on Thursday, as gains in the IT, Technology and Real Estate sectors led shares higher. MSCI India advanced by 1.69% to close at 1,969.37 points.

News

Nigeria:

FCMB Group posts 73.2% profit, leverages renewable energy Firm, GPS partner on Bayelsa's N13.6billion gas plant NLNG, NPA to Partner on Deployment of Vessel Traffic Service

Kenya:

CBK Retains Base Lending Rate at 7.5%, Expects Inflation to Ease EABL Posts 124% Rise in Net Income for Full Year 2022 Foreign Investor Outflows at the NSE Surge to Ksh 10.88 B As Shocks Persist

Abu Dhabi:

FAB's 1H net profit soars 50% on lower provisions and interest income boost ADCB Q2 profit rises on higher interest income and lower provisions Aldar agrees to buy four properties from Mubadala in \$1.17bn deal

Saudi Arabia:

Saudi stock exchange approves listing of \$780m government debt Saudi Arabia to grant industrial licenses to water production plants Saudi's Mobily Q2 profit up 47.5% to \$96m

Egypt:

ReNew to invest \$8 billion to set up green hydrogen plant in Egypt ADNOC Distribution acquires 50% of Total Energies in Egypt Bank of England, Central Bank of Egypt team up to fight climate crisis

South Africa:

SA set to take over part of Eskom's \$24bn debt Eskom partners with Netherlands to repurpose Grootvlei Power Station ArcelorMittal plans to invest in rail equipment

India:

Bajaj Finance reports profit up 150% for Q1 FY23, asset quality improves Bank credit rises 12.89%; deposit 8.35% RBI data Nestle India Q2 net falls 4.3% to Rs 515.34 cr, sales up 15.7% to Rs 4,006.86 cr

Vietnam:

Remittances to HCM City drop 13% in H1 FDI disbursement up 10.2% in seven months Banking sector's digital transformation to take place next month

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,564.26	-0.1%	-1.0%	2.0%	12.7%	AED/USD	3.67	0.0%	0.0%
Egypt	9,369.32	0.9%	0.9%	1.6%	-21.3%	EGP/USD	18.92	-0.1%	20.4%
India	16,929.60	1.7%	1.3%	7.3%	-2.4%	INR/USD	79.76	-0.2%	7.3%
Kenya	1,681.71	0.3%	0.3%	4.3%	-11.6%	KES/USD	118.80	0.0%	5.0%
Nigeria	1,788.85	-1.1%	-5.1%	-5.2%	3.9%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,155.02	0.9%	1.4%	5.5%	7.3%	SAR/USD	3.76	0.0%	0.0%
South Africa	62,169.99	0.3%	0.7%	3.4%	-7.3%	ZAR/USD	16.59	-1.6%	3.9%
Vietnam	1,236.14	1.4%	0.6%	-1.0%	-19.5%	VND/USD	23,363.00	-0.1%	2.5%

MSCI Emerging Markets

MSCI Frontier	519.54	0.8%	1.0%	0.4%	-21.9%	Brent Crude (\$)	107.14	0.5%	37.7%
MSCI Frontier 100	1,211.10	0.8%	0.9%	0.8%	-21.0%	Gold (\$)	1,769.20	1.8%	-3.2%
MSCI Emerging	997.61	0.8%	0.7%	-0.3%	-19.0%	Copper (\$)	7,762.00	1.6%	-20.1%
MSCI World (USD)	2,709.82	1.3%	2.2%	6.4%	-16.1%	Coffee (\$)	192.86	2.0%	-2.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	6.80	7.9%	-12.8%	6.61	Stanbic IBTC	28.40	-10.0%	-21.1%	22.67
Sterling	1.49	2.8%	-0.7%	4.69	Cadbury	15.40	-9.9%	75.0%	8.69
United Capital PLC	10.10	1.0%	2.0%	73.34	Nestle	1262.30	-9.8%	-10.8%	133.71
Transnational Corporation	1.02	1.0%	3.0%	39.01	Axamansard	1.72	-9.5%	-22.9%	2.25
					Zenith	18.90	-8.3%	-24.4%	333.74
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%	6.97
Seplat Petroleum	1430.50	1430.50	0.0%	120.64	Nestle	1262.30	1262.30	0.0%	133.69
Okomu Oil	216.90	216.90	0.0%	1.22	Stanbic IBTC	28.40	28.40	0.0%	22.67
Airtel Africa	1905.40	1905.40	0.0%	68.82	UBA	6.80	6.80	0.0%	85.44
BUA Cement	69.30	74.50	-7.0%	26.37	Zenith	18.90	18.90	0.0%	320.06

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.48	6.7%	-17.9%	0.00	Ooredoo	6.75	-10.0%	3.8%	0.01
RAK Co. for White Cement & Construction	2.10	6.6%	23.5%	1.06	Invictus Investment Co	3.83	-3.8%	-5.0%	9.60
Fertiglobe Plc	4.68	4.2%	33.0%	33.99	ADC Acquisition Corp PJSC Warrants	1.55	-2.5%	106.7%	0.01
Arkan Building Materials Company	1.20	2.6%	-15.5%	10.40	Easylease motorcycle rentals	38.80	-2.5%	33.8%	11.67
Adnoc Drilling Company	3.55	2.3%	4.4%	36.82	Abu Dhabi Natnl for Building Mt.	0.16	-2.4%	-35.7%	0.04
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%	0.56
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sharjah Cement	0.60	0.58	4.0%	0.00
United Arab Bank	0.73	0.73	0.0%	0.00	Abu Dhabi Natnl for Building Mt	0.16	0.15	4.6%	0.04
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.20	1.14	5.3%	10.43

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	12.57	4.3%	-12.6%	8.51	Ibsina Pharma	1.50	-1.7%	-56.9%	21.62
Egyptian Kuwaiti Holding-EGP	22.40	4.2%	14.0%	0.47	Credit Agricole Egypt	5.34	-1.5%	-36.6%	2.14
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.49	3.8%	3.8%	6.20	Telecom Egypt	13.35	-1.3%	-20.4%	3.48
Housing & Development Bank	33.79	3.0%	-23.3%	1.80	Egyptian Financial Group-Hermes	11.46	-0.8%	-7.1%	14.95
Medinet Nasr Housing	2.85	2.5%	11.8%	26.90	Cleopatra Hospital Company	4.20	-0.7%	-14.6%	13.49
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	2.85	3.00	-5.0%	26.90	Eastern Company	9.85	9.62	2.4%	5.20
Egyptian Kuwaiti Holding-EGP	22.40	25.50	-12.2%	0.47	Oriental Weavers	6.57	6.30	4.3%	5.27
Misr Fertilizers ProductionCompany - Mopco	99.29	114.00	-12.9%	1.65	Telecom Egypt	13.35	12.77	4.5%	3.48
Alexandria Mineral Oils Company	3.83	4.48	-14.5%	1.99	Cleopatra Hospital Company	4.20	4.00	5.0%	13.49
Tenth Of Ramadan Pharma Industries & Diagnostic	2.49	2.93	-15.0%	6.20	Housing & Development Bank	33.79	31.01	9.0%	1.80

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finance	7065.50	10.5%	1.3%	44984.671	Shree Cement	20380.00	-3.1%	-24.5%	2434.05
Bajaj Finserv	14650.00	10.1%	-10.7%	23312.36	Bharti Airtel	667.00	-1.2%	-2.5%	4936.12
Tata Steel	100.20	4.4%	-91.0%	13644.29	Ultratech Cement	6475.00	-0.9%	-14.7%	3010.87
Kotak Mahindra Bank	1827.50	4.2%	1.7%	3896.62	Dr Reddys Lab	4256.00	-0.7%	-13.3%	2401.27
SBI Life Insurance	1192.75	3.8%	-0.3%	1226.96	Cipla	968.00	-0.6%	2.5%	1012.15
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	202.80	209.00	-3.0%	1033.75	Wipro	415.60	391.00	6.3%	3298.06
State Bank Of India	532.15	549.00	-3.1%	6475.59	HDFC Life Insurance Company	535.75	497.05	7.8%	6046.87
Maruti Suzuki India	8718.80	9050.00	-3.7%	6307.50	Hcl Technologies	948.00	877.35	8.1%	2680.34
Eicher Motors	3060.00	3179.00	-3.7%	1488.23	Tech Mahindra	1040.70	943.70	10.3%	3532.55
Mahindra & Mahindra	1149.35	1195.00	-3.8%	2210.21	Tata Consultancy Svs.	3262.00	2953.00	10.5%	6828.94

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	9.18	8.0%	-34.9%	1.94	Stanbic Holdings	90.75	-8.6%	4.0%	4.02
East African Breweries Limited	153.00	6.8%	-7.3%	5.98	Kenya Power & Lighting Limited	1.40	-2.1%	-20.0%	1.47
Equity Group Holdings Plc	47.95	3.1%	-9.1%	120.20	Diamond Trust Bank Limited	48.85	-1.0%	-17.9%	1.24
Absa Bank Kenya	10.95	2.8%	-7.6%	1.95	Kenya Reinsurance Corporation Ltd	1.99	-0.5%	-13.5%	0.24
KCB Group Plc	40.00	2.4%	-12.0%	54.75	Total Kenya Ltd	22.90	-0.4%	-8.4%	0.02
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	133.00	148.75	-10.6%	3.88	Diamond Trust Bank Limited	48.85	48.00	1.8%	1.24
Equity Group Holdings Plc	47.95	55.00	-12.8%	120.20	Kenya Reinsurance Corporation Ltd	1.99	1.92	3.6%	0.24
British American Tobacco Kenya Ltd	444.75	512.00	-13.1%	0.00	Bamburi Cement Limited	33.30	32.00	4.1%	0.94
NCBA Group Plc	24.85	29.00	-14.3%	1.25	Kengen Limited	3.50	3.35	4.5%	1.80
Absa Bank Kenya	10.95	12.95	-15.4%	1.95	Kenya Power & Lighting Limited	1.40	1.30	7.7%	1.47

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
The National Company for Glass Industries	35.50	9.9%	-19.3%	153.43	United Cooperative Assurance Co.	10.68	-8.6%	-68.5%	396.68
Al Yamamah Steel Industries Co.	35.90	8.5%	-17.3%	40.67	Al Alamiya for Coop Insurance Co.	18.82	-2.0%	-17.6%	1.22
National Industrialization Co.	16.38	6.4%	-17.9%	114.07	Saudi Re for Coop Reinsurance Co.	16.30	-1.7%	-1.8%	1.47
Al Kathiri Holding Co.	46.30	5.0%	-33.8%	8.69	Rabigh Refining and Petrochemical Co.	18.30	-1.2%	-11.6%	60.67
Electrical Industries Co.	24.38	4.9%	-11.7%	8.40	Almarai Co.	52.20	-1.1%	7.1%	13.64
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.	171.80	171.80	0.0%	38.72	Alkhabeer REIT Fund	7.65	7.65	0.0%	3.14
Scientific and Medical Equipment House Co.	69.20	69.20	0.0%	38.22	Allied Cooperative Insurance Group	14.18	14.18	0.0%	1.24
Elm Co.	294.00	294.00	0.0%	40.52	CHUBB Arabia Coop Insurance Co.	18.32	18.32	0.0%	3.83
Almunajem Foods Co.	66.00	66.00	0.0%	29.84	Gulf General Coop Insurance Co.	8.80	8.80	0.0%	3.05
Saudi Tadawul Group Holding Co.	221.00	221.00	0.0%	113.85	Gulf Union Alahlia	8.99	8.99	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)
Gold Fields Ltd	15417.00	3.3%	-11.5%	53317.51	MTN Group	14050.00	-2.8%	-17.7%	71970.52
AngloGold Ashanti Ltd	24775.00	2.8%	-24.6%	41726.45	British American Tobacco PLC	68100.00	-2.8%	16.2%	49039.63
Sibanye Stillwater Ltd	3967.00	2.0%	-19.2%	47070.57	Vodacom Group Ltd	14047.00	-1.7%	4.3%	20700.92
Anglo American PLC	57238.00	1.9%	-11.3%	118244.61	Reinet Investments	29433.00	-1.5%	2.9%	5763.54
FirstRand Ltd	6590.00	1.7%	8.4%	55369.09	Bid Corp Ltd	30592.00	-1.5%	-6.3%	17435.05
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)
Shoprite Holdings Ltd	22650.00	24723.00	-8.4%	32535.41	SPAR Group Ltd/The	13552.00	12909.00	5.0%	7897.06
Bidvest Group Ltd/The	21483.00	23636.00	-9.1%	10171.92	Old Mutual Ltd	1130.00	1063.00	6.3%	17167.49
Investec PLC	8756.00	9684.15	-9.6%	4912.16	Clicks Group Ltd	28001.00	26132.00	7.2%	13732.67
Investec Ltd	8717.00	9830.56	-11.3%	4647.09	Sanlam Ltd	5459.00	5065.00	7.8%	14777.23
Remgro Ltd	13631.00	15485.00	-12.0%	18129.33	Mr Price Group Ltd	18042.00	16455.00	9.6%	9929.18

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vincom Retail	28100.00	6.8%	-6.6%	123075.19	BaoViet Holdings	56600.00	-1.0%	1.1%	44419.68
Sai Gon Thuong Tin Commercial	24450.00	6.1%	-22.4%	983823.99	FPT Corp	84900.00	-0.4%	9.5%	141341.52
Saigon Securities Inc	21150.00	3.7%	-54.0%	412025.27	Mobile World Inv. Corp	62000.00	-0.2%	-8.2%	120931.00
PetroVietnam Power Corp	13550.00	3.4%	-22.6%	263571.89					
Saigon Beer Alcohol Beverage Corp.	173000.00	3.2%	17.1%	40360.90					
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.	173000.00	181400.00	-4.6%	40360.90	Vingroup JSC	67000.00	66000.00	1.5%	77197.40
Phu Nhuan Jewelry	113000.00	130421.95	-13.4%	80117.00	Vinhomes	58800.00	57520.56	2.2%	112560.84
FPT Corp	84900.00	99083.29	-14.3%	141341.52	No Va Land Invest	74000.00	72000.00	2.8%	128412.20
Vietjet Aviation	127400.00	149000.00	-14.5%	70923.58	Vietnam Rubber Group JSC	21400.00	20500.00	4.4%	503124.70
Asia Commercial JS Bank	24450.00	29480.00	-17.1%	81846.38	Hoa Phat Group JSC	21400.00	20500.00	4.4%	503124.70

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