

# Daily Market Report

## 4 July 2022

### JSE

JSE All-Share decreased by 0.85% to close at 65,661.73 points on Friday, as the Industrial, Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 207.35 points, down by 0.14% on Friday, with Ecobank Côte d'Ivoire and Sode Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index inched up by 0.02% to close at 51,829.67 points on Friday, as the Insurance, Banking and Industrial sector recorded gains.

### EGX

EGX 30 Index fell by 2.35% to close at 9,008.89 points on Sunday, as the market cap shed around LE 13.48 billion, amid Arab and foreign selling.

### ESG

Casablanca ESG 10 Index fell by 2.36% to close at 877.82 points on Friday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.85%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼ 0.14%
<b>NSE</b> Nigerian Stock Exchange	▲ 0.02%
<b>EGX</b> Egyptian Stock Exchange	▼ 2.35%
<b>ESG</b> Casablanca Stock Exchange	▼ 2.36%

### African Markets

**Nigeria:** NSE 30 Index inched up by 0.05% and closed at 1,888.50 points on Friday. Custodian and Unilever were the top gainers.

**Egypt:** EGX 30 Index fell by 2.35% to close at 9,008.89 points on Sunday, as the market cap shed around LE 13.48 billion, amid Arab and foreign selling.

**Kenya:** NSE 20 Index increased by 0.62% and closed at 1,622.85 points on Friday. WPP Scangroup and Kenya Power & Lighting were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.78% to close at 59,640.36 points on Friday, as the Industrial, Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.86
<b>INTERBANK RATES</b>	
OPR	14.00 ▲
Overnight	14.00 ↔

### Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.32% to close at 9,344.62 points on Friday, as losses in the Energy, Industrials, and Telecom sectors led shares lower. MSCI UAE decreased by 0.61% and closed at 428.41 points.

**Vietnam:** VN-30 Index increased by 0.27% to close at 1,252.24 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam inched up by 0.05% and closed at 791.76 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.51% to close at 11,464.98 points on Sunday, as losses in the Building & Construction, Media & Publishing and Insurance sectors led shares lower. MSCI Saudi Arabia declined by 0.33% to close at 1,593.45 points.

**India:** Nifty 50 Index decreased by 0.18% to close at 15,752.05 points on Friday, as losses in the Oil & Gas, Public Sector Undertakings and Power sectors led shares lower. MSCI India slipped by 0.06% and closed at 1,823.22 points.

### News

#### Nigeria:

Bank assets rise by 21% to ₦64.32tn – CBN  
FG Raised ₦1.84tn Via Bond To Bridge 2022 Budget Deficit In H1  
Presco lists ₦50b bond on FMDQ Exchange

#### Kenya:

Kenya economy surpasses pre-pandemic levels in Q1  
Safaricom eyes 40pc long-term margins in Ethiopia business  
Equity receives Sh850m dividend from fintech unit

#### Abu Dhabi:

UAE raises fuel prices for 5th time in a year  
UAE and Indonesia secure CEPA deal  
Mashreq announces pricing of \$300m notes

#### Saudi Arabia:

Saudi banks' real estate lending grows to \$161 billion in Q1  
Fuel, feedstock prices for Saudi industrial sector to be adjusted from Q423  
TRSDC signs first JV worth \$400m with Al Mutlaq Group

#### Egypt:

Al-Qamzi Developments invests EGP 14bn in 204-feddan SeaZen project  
IPO of Ghazl El-Mahalla Football Club extended to August 14  
Expedition Investments submits offer to acquire Domty shares

#### South Africa:

SA's private sector credit up 5.34% y/y in May  
Sibanye to acquire majority shareholding in Finnish mining co  
Eastern Cape gets export boost from Transnet's R9bn ports investment

#### India:

Govt slaps windfall tax on fuel exports, domestic crude  
Centre raises customs duty on gold to 12.5% from 7.5%  
Bourses clear merger of HDFC with HDFC Bank

#### Vietnam:

Binh Phuoc posts nearly 700 million USD in H1 trade surplus  
Vietsovetrol launches two support sets of Dragon oilfield  
Aquatic exports spike 40% in H1

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,344.62	-0.3%	0.0%	-0.3%	10.1%	AED/USD	3.67	0.0%	0.0%
Egypt	9,008.89	-2.3%	-2.3%	-2.3%	-24.4%	EGP/USD	18.80	0.0%	19.7%
India	15,752.05	-0.2%	0.0%	-0.2%	-9.2%	INR/USD	79.04	0.1%	6.3%
Kenya	1,622.85	0.6%	0.0%	0.6%	-14.7%	KES/USD	118.22	0.4%	4.5%
Nigeria	1,888.50	0.05%	0.0%	0.0%	9.6%	NGN/USD	418.08	0.7%	1.0%
Saudi Arabia	11,464.98	-0.5%	-0.5%	-0.5%	1.2%	SAR/USD	3.75	0.0%	-0.1%
South Africa	59,640.36	-0.8%	0.0%	-0.8%	-11.1%	ZAR/USD	16.42	1.1%	2.9%
Vietnam	1,252.24	0.3%	0.0%	0.3%	-18.5%	VND/USD	23,278.50	0.0%	2.1%

## MSCI Emerging Markets

MSCI Frontier	515.80	-0.3%	0.0%	-0.3%	-22.5%	Brent Crude (\$)	111.63	-2.8%	43.5%
MSCI Frontier 100	1,199.32	-0.2%	0.0%	-0.2%	-21.8%	Gold (\$)	1,801.50	-0.3%	-1.5%
MSCI Emerging	992.84	-0.8%	0.0%	-0.8%	-19.4%	Copper (\$)	8,048.00	-2.5%	-17.2%
MSCI World (USD)	2,559.95	0.5%	0.0%	0.5%	-20.8%	Coffee (\$)	200.92	0.2%	1.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
P Z Cussons	10.20	6.3%	67.2%	4.21	Cadbury	16.30	-5.5%	85.2%	5.92
Custodian	7.30	4.3%	-6.4%	3.63	Fidelity	3.30	-3.5%	29.4%	5.08
Unilever	15.30	3.4%	14.2%	3.19	Dangote Sugar	16.00	-1.8%	-3.0%	19.21
Wema	3.26	2.2%	312.7%	3.46	UBA	7.40	-0.7%	-7.5%	165.59
Access	9.40	1.6%	3.3%	11.32	Guaranty	20.45	-0.2%	-21.3%	480.30
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.26	3.26	0.0%	3.46	Guaranty	20.45	18.00	13.6%	480.30
UACN	11.10	11.10	0.0%	1.39	Cap	18.15	15.25	19.0%	2.32
Transcorp Hotels	6.25	6.25	0.0%	0.28	Nascon	11.75	9.00	30.6%	0.15
Total	234.50	234.50	0.0%	1.09	UBN	6.15	4.65	32.3%	0.34
Seplat Petroleum	1300.50	1300.50	0.0%	233.44	Sterling	1.54	1.13	36.3%	11.14

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Properties PJSC	0.66	6.3%	-14.3%	10.87	Waha Capital	1.43	-9.5%	19.2%	3.26
Gulf Pharmaceutical Ind.	1.36	5.4%	-26.1%	0.72	Dana Gas PJSC	1.02	-6.4%	-3.8%	5.29
Easylease motorcycle rentals	38.12	5.0%	31.4%	16.00	Invictus Investment Company PLC	4.97	-6.2%	23.3%	47.84
ADC ACQUISITION CORPORATION PJSC WARRANTS	1.69	4.32%	125.3%	0.13	PALMS SPORTS	10.76	-4.8%	-11.9%	0.15
ARKAN BUILDING MATERIALS COMPANY	1.21	1.7%	-14.8%	0.90	GHITHA HOLDING P.J.S.C.	76.50	-4.3%	178.2%	49.54
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	Du	5.70	5.68	0.4%	1.19
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	1.87
Sharjah Insurance	1.38	1.38	0.0%	0.00	Insurance House	0.87	0.81	7.70%	0
National Bank of Umm Al Qaiwain	1.85	1.85	0.0%	0.00	Gulf Pharma Ind.	1.36	1.20	13.3%	0.05

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Misr Fertilizers Production Company - Mopco	95.99	2.1%	-1.5%	3.28	GB AUTO	2.48	-7.1%	-51.4%	4.41
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.20	0.5%	-8.3%	5.50	Credit Agricole Egypt	4.84	-7.1%	-42.5%	7.30
					Citadel Capital - Common Shares	1.10	-5.0%	-9.2%	6.01
					E-finance For Digital and Fin Investments	12.83	-5.0%	-22.3%	30.99
					ELSWEDY ELECTRIC	5.77	-4.8%	-26.6%	11.77
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£)
Telecom Egypt	13.62	13.62	0.0%	6.53	Citadel Capital - Common Shares	1.10	1.10	0.0%	6.01
Sidi Kerir Petrochemicals - SIDPEC	7.00	7.00	0.0%	5.00	Commercial Intl Bank (Egypt)	36.45	36.45	0.0%	124.95
Oriental Weavers	6.58	6.58	0.0%	2.83	Credit Agricole Egypt	4.84	4.84	0.0%	7.30
Misr Fertilizers Production Company - Mopco	95.99	95.99	0.0%	3.28	Eastern Company	10.10	10.10	0.0%	3.27
Heliopolis Housing	4.89	4.89	0.0%	7.89	E-finance For Digital and Fin Investments	12.83	12.83	0.0%	1.92

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ITC	284.75	4.1%	30.6%	9842.518	ONGC	131.40	-13.3%	-7.7%	17143.69
Bajaj Finance	5617.95	4.0%	-19.5%	6717.69	Reliance Industries	2406.00	-7.3%	1.6%	92119.87
Bajaj Finserv	11315.00	3.5%	-31.0%	4572.36	Power Grid Corp Of India	206.55	-2.5%	1.1%	1735.77
Cipla	948.00	3.4%	0.4%	1677.59	Bajaj Auto	3621.70	-2.3%	11.5%	2746.79
Bharat Petroleum	318.50	3.3%	-17.4%	1381.94	Bharti Airtel	673.00	-1.7%	-1.6%	3024.13
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Mahindra & Mahindra	1107.00	1121.45	-1.3%	3101.86	Kotak Mahindra Bank	1678.00	1626.00	3.2%	3822.23
Eicher Motors	2789.00	2994.00	-6.8%	1018.80	Hcl Technologies	979.05	944.05	3.7%	2746.68
Hero Motocorp	2758.80	2968.95	-7.1%	1075.82	Adani Ports And Sez.	678.30	651.95	4.0%	2105.49
Maruti Suzuki India	8399.95	9050.00	-7.2%	4440.63	Axis Bank	644.00	618.25	4.2%	4191.26
Coal India	183.20	209.00	-12.3%	3132.37	Wipro	422.05	402.05	5.0%	1855.02

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	3.23	4.9%	-46.2%	0.05	Centum Investment Company Plc	9.02	-7.8%	-43.8%	9.79
Kenya Power & Lighting Limited	1.47	2.8%	-14.0%	0.19	Total Kenya Ltd	22.50	-4.1%	-6.3%	0.15
Kenya Reinsurance Corporation Ltd	2.04	2.5%	-12.1%	0.05	Standard Chartered Bank Kenya Ltd	124.00	-0.6%	-14.0%	62.88
British American Tobacco Kenya Ltd	415.00	1.8%	15.0%	1.87	Diamond Trust Bank Limited	49.70	-0.5%	-33.7%	0.51
Nairobi Securities Exchange Plc	7.24	1.7%	-11.3%	0.04					
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	99.00	108.00	-8.3%	0.01	Centum Investment Company Plc	9.02	9.00	0.2%	9.79
Bamburi Cement Limited	34.40	40.00	-14.0%	0.23	Kengen Limited	3.40	3.35	1.5%	0.79
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	62.88	Diamond Trust Bank Limited	49.70	48.50	2.5%	0.51
Absa Bank Kenya	10.60	12.95	-18.1%	0.71	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	62.88
Total Kenya Ltd	22.50	27.50	-18.2%	0.15	NCBA Group Plc	23.70	23.00	3.0%	2.61

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Enaya Cooperative Insurance Co.	19.30	9.9%	-37.9%	16.18	Wafrah for Industry and Development	35.50	-6.8%	-75.5%	9.61
Al Alamiya for Cooperative Insurance Co.	18.70	5.1%	-18.1%	2.61	Al-Baha Investment and Development	14.94	-6.0%	-57.7%	20.42
Arabian Centres Co.	20.34	5.0%	-9.9%	46.48	Arab Sea Information System	61.30	-6.0%	-68.7%	76.53
Arabian Cement Co.	35.00	3.9%	-7.4%	11.15	Saudi Arabian Fertilizer Co.	38.50	-4.9%	-62.4%	23.68
National Company for Learning and Education	62.00	3.9%	3.3%	9.48	Saudi Industrial Export Co.	33.05	-4.6%	-12.7%	51.13
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.	161.00	161.00	0.0%	10.81	Al Kathiri Holding	43.50	43.50	0.0%	2.21
Elm Co.	252.00	252.00	0.0%	60.56	Naseej International Trading Co	16.50	16.50	0.0%	3.21
Saudi Tadawul Group Holding Co.	193.60	193.60	0.0%	57.40	Gulf General Coop Insurance Co.	8.88	8.88	0.0%	3.32
ACWA POWER Co.	150.00	150.00	0.0%	63.80	Gulf Union Alahlia	8.98	8.98	0.0%	0.71
The Saudi National Bank	66.50	66.50	0.0%	54.30	National Shipping Company of Saudi Arabia	20.38	20.38	0.0%	35.93

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers	251750.00	6.3%	1.8%	521122.50	Exxaro Resources	18382.00	7.3%	20.2%	19117.28
MTN Group	13675.00	3.6%	-19.9%	96545.50	Sasol Ltd	34935.00	6.0%	34.9%	52053.15
Vodacom Group	13345.00	1.8%	-0.9%	25488.95	African Rainbow Minerals	20608.00	3.6%	-10.9%	6497.29
Aspen Pharmacare Holdings	14052.00	1.1%	-37.4%	9950.50	Impala Platinum Holdings	17480.00	3.5%	-22.3%	48244.80
Reinet Invest	28609.00	0.1%	0.0%	10290.37	Investec	8466.00	3.1%	3.2%	7332.66
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	8466.00	9684.15	-12.6%	7332.66	Sibanye Stillwater	4006.00	4049.00	-1.1%	30405.54
Bidvest Group Ltd/The	20567.00	23636.00	-13.0%	18304.63	Mr Price Group Ltd	17299.00	17323.00	-0.1%	11580.47
Investec Ltd	8517.00	9830.56	-13.4%	10475.91	Sanlam Ltd	5234.00	5229.00	0.1%	21825.78
Bid Corp Ltd	30626.00	36098.00	-15.2%	19327.46	Growthpoint Properties Ltd	1215.00	1212.00	0.2%	10534.05
MultiChoice Group	11504.00	13650.00	-15.7%	6326.39	NEPI Rockcastle PLC	8555.00	8501.00	0.6%	7870.51

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	19700.00	4.8%	-62.0%	293.197.85	Masan Group Corp	109500.00	-2.2%	-36.0%	52.766.43
Bank for Inv. and Devp	35050.00	4.6%	-5.5%	118.065.28	Petrovietnam Gas	113000.00	-2.2%	17.5%	109.523.65
Vietnam JSC Bank	26950.00	3.1%	-20.5%	92358.48	Mobile World Inv. Corp	70300.00	-1.7%	-48.3%	230114.52
Sai Gon Thuong Tin Commercial	22000.00	2.3%	-30.2%	357614.43	Vingroup JSC	72600.00	-1.2%	-23.7%	133666.48
FPT Corp	88000.00	2.1%	-5.4%	146.497.78	Vinhomes	61400.00	-1.1%	-25.1%	184.158.95
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	130100.00	130100.00	0.0%	66821.58	Hoa Phat Group JSC	22400.00	22400.00	0.0%	335.288.96
Vingroup JSC	72600.00	72600.00	0.0%	133666.48	Khang Dien House Trading & Investment	38850.00	38850.00	0.0%	32.172.66
Phu Nhuan Jewelry	128200.00	128200.00	0.0%	118856.54	Military Commercial Bank	24200.00	24200.00	0.0%	179816.52
Masan Group Corp	109500.00	109500.00	0.0%	52.766.43	Vietnam National Petroleum Group	40600.00	40600.00	0.0%	21602.63
Petrovietnam Gas	113000.00	113000.00	0.0%	109.523.65	Sai Gon Thuong Tin Commercial	22000.00	22000.00	0.0%	357614.43

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