

Daily Market Report

5 July 2022

JSE

JSE All-Share rose by 2.08% to close at 67,024.81 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 206.61 points, down by 0.36% on Monday, with NEI-CEDA Côte d'Ivoire and Total Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index inched down by 0.07% to close at 51,791.45 points on Monday, as the Consumer goods, Oil & Gas and Industrial sectors recorded losses.

EGX

EGX 30 Index fell by 3.59% to close at 8,685.74 points on Monday, as the market cap shed around LE 15.25 billion, amid foreign selling.

ESG

Casablanca ESG 10 Index slipped by 0.05% to close at 877.35 points on Monday.

African Markets

Nigeria: NSE 30 Index was down by 0.13% and closed at 1,886.00 points on Monday. Nigerian Breweries and Fidelity were the top losers.

Egypt: EGX 30 Index fell by 3.59% to close at 8,685.74 points on Monday, as the market cap shed around LE 15.25 billion, amid foreign selling.

Kenya: NSE 20 Index advanced by 1.04% and closed at 1,639.75 points on Monday. Centum Investment Company and Safaricom were the top gainers.

South Africa: JSE Top 40 Index jumped by 2.11% to close at 60,901.62 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 2.08%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.36%

NSE

Nigerian Stock Exchange ▼ 0.07%

EGX

Egyptian Stock Exchange ▼ 3.59%

ESG

Casablanca Stock Exchange ▼ 0.05%

Nigeria Key Indicators

| | Current |
|------------------------|---|
| Inflation | 17.71% |
| Exchange Rate | ₦ 415.80 |
| INTERBANK RATES | |
| OPR | 13.83 ▼ |
| Overnight | 14.00 ↔ |

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.43% to close at 9,304.86 points on Monday, as losses in the Telecom, Health Care, Financials, Industrials, Energy, Utilities, and Basic Materials sectors led shares lower. MSCI UAE decreased by 1.29% to close at 422.88 points.

Vietnam: VN-30 Index decreased by 0.31% to close at 1,248.37 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.33% to close at 789.17 points.

Saudi Arabia: Tadawul All Share Index declined by 0.93% to close at 11,358.40 points on Monday, as losses in the Media & Publishing, Industrial Investment and Cement sectors led shares lower. MSCI Saudi Arabia declined by 0.88% to close at 1,579.36 points.

India: Nifty 50 Index increased by 0.53% to close at 15,835.35 points on Monday, as gains in the Fast Moving Consumer Goods, Banking and Capital Goods sectors led shares higher. MSCI India edged up by 0.05% to close at 1,833.2 points.

News

Nigeria:

ICRC plans 53 PPP projects worth \$22bn in 2022
FG issues guideline to retain oil sector spending in Nigeria
Solid minerals imports rise by 74% in 12 months

Kenya:

Retail investors redeem Sh30bn Treasury bonds
Kenya seeks to rival London, Dubai with new financial hub
Nairobi financial hub signs up three global firms on launch

Abu Dhabi:

UAE's CEPA pacts to boost economy by 2.6% by 2030, minister says
Dubai to raise share of renewables to 14% of energy mix by end of year
Union Properties merges three business units under Edacom to drive profitability

Saudi Arabia:

\$5.32bn approved to help citizens affected by rise in commodity prices
Saudi Exchange kicks off single-stock futures trading, led by Aramco, stc
Wafrah's rights issue 78% oversubscribed

Egypt:

Suez Canal records its highest annual revenue of \$7bn
Egypt's budget deficit falls to 6.1% of GDP in 2021/22
3 MoUs signed with global institutions, companies - EMRA

South Africa:

SA confirms fuel subsidy will end as prices jump 11%
Rocketing fuel prices set to drive SA interest rates sharply higher
SA seeks legal advice on R396bn Eskom debt burden

India:

HDFC merger gets RBI nod, will up pvt banks' mkt share
Exports rise 16.78% to \$37.94 bn in June; trade deficit at record \$25.63 bn
Tamil Nadu signs 60 MoUs to attract Rs 1.25 lakh crore investment

Vietnam:

GDP in first half of 2022 up 6.42%
SBV announces amendments to bank loans circular
PV GAS's after-tax profit hits nearly 300 mn USD in 6 months

Indices and FX Data

| Indices | Last Trade | 1d% | WTD% | MTD% | YTD% | Currency/Commodity | Last Trade | 1d% | YTD% |
|--------------|------------|-------|-------|--------|--------|--------------------|------------|-------|-------|
| Abu Dhabi | 9,304.86 | -0.4% | -0.4% | -0.7% | 9.6% | AED/USD | 3.67 | 0.0% | 0.0% |
| Egypt | 8,685.74 | -3.6% | -5.9% | -5.9% | -27.1% | EGP/USD | 18.88 | 0.4% | 20.2% |
| India | 15,835.35 | 0.5% | 0.5% | 0.3% | -8.8% | INR/USD | 78.94 | -0.1% | 6.2% |
| Kenya | 1,639.75 | 1.0% | 1.0% | 1.7% | -13.8% | KES/USD | 117.95 | 0.0% | 4.2% |
| Nigeria | 1,886.00 | -0.1% | -0.1% | -0.1% | 9.5% | NGN/USD | 419.75 | 1.1% | 1.5% |
| Saudi Arabia | 11,358.40 | -0.9% | -1.4% | -1.4% | 0.2% | SAR/USD | 3.75 | 0.0% | 0.0% |
| South Africa | 60,901.62 | 2.1% | 2.1% | 1.3% | -9.2% | ZAR/USD | 16.33 | -0.8% | 2.3% |
| Vietnam | 1,248.37 | -0.3% | -0.3% | -0.04% | -18.7% | VND/USD | 23,367.50 | 0.4% | 2.5% |

MSCI Emerging Markets

| | | | | | | | | | |
|-------------------|----------|---------|---------|-------|--------|------------------|----------|-------|--------|
| MSCI Frontier | 518.66 | 0.6% | 0.6% | 0.2% | -22.1% | Brent Crude (\$) | 113.44 | 1.6% | 45.8% |
| MSCI Frontier 100 | 1,207.89 | 0.7% | 0.7% | 0.5% | -21.2% | Gold (\$) | 1,810.05 | 0.5% | -1.0% |
| MSCI Emerging | 992.80 | -0.004% | -0.004% | -0.8% | -19.4% | Copper (\$) | 8,006.00 | -0.5% | -17.6% |
| MSCI World (USD) | 2,567.87 | 0.3% | 0.3% | 0.9% | -20.5% | Coffee (\$) | 197.83 | -1.5% | -0.4% |

STOCKS

Nigeria

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₦) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₦) |
|-----------------------|------------|---------|----------|--------------|----------------------|------------|---------|----------|------------|
| Wema | 3.30 | 1.2% | 317.7% | 30.62 | Nigerian Breweries | 55.85 | -5.0% | 16.4% | 28.64 |
| Cadbury | 16.50 | 1.2% | 87.5% | 30.14 | Fidelity | 3.24 | -1.8% | 27.1% | 8.32 |
| Zenith | 22.10 | 1.1% | -11.6% | 189.30 | Lafarge Africa | 26.10 | -1.5% | 10.1% | 68.94 |
| UACN | 11.20 | 0.9% | 16.7% | 64.64 | Sterling | 1.52 | -1.3% | 1.3% | 8.69 |
| UBA | 7.45 | 0.7% | -6.9% | 131.22 | Access | 9.30 | -1.1% | 2.2% | 62.07 |
| 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% | 1.07 | Nascon | 11.75 | 11.70 | 0.4% | 2.39 |
| Seplat Petroleum | 1300.50 | 1300.50 | 0.0% | 43.89 | Nestle | 1400.00 | 1390.00 | 0.7% | 4.34 |
| Okomu Oil | 216.90 | 216.90 | 0.0% | 7.59 | Access | 9.30 | 9.20 | 1.1% | 61.69 |
| Airtel Africa | 1732.20 | 1767.00 | -2.0% | 349.27 | Cap | 18.15 | 17.55 | 3.4% | 0.92 |
| BUA Cement | 71.90 | 74.50 | -3.5% | 10.74 | Zenith | 22.10 | 21.25 | 4.0% | 189.68 |

Abu Dhabi

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn DH) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn DH) |
|----------------------------------|------------|-------|----------|---------------|---------------------------------|------------|-------|----------|-------------|
| Easylease motorcycle rentals | 40.00 | 4.9% | 37.9% | 15.36 | Gulf Medical Projects | 2.48 | -9.8% | 45.9% | 0.00 |
| Sudatel Telecom | 0.34 | 4.2% | -1.7% | 0.01 | Invictus Investment Company PLC | 4.69 | -5.6% | 16.4% | 3.58 |
| Chimera S&P Shariah Value ETF | 3.68 | 2.2% | 2.2% | 0.02 | Adc Acq Corp Pjsc Warrants | 1.62 | -4.1% | 116.0% | 0.08 |
| Arkan Building Materials Company | 1.23 | 1.65% | -13.4% | 5.54 | Palms Sports | 10.32 | -4.1% | -15.5% | 9.18 |
| Abu Dhabi Ports Company | 5.55 | 1.5% | 53.3% | 38.47 | Q Holding Psc | 3.89 | -3.5% | -11.8% | 9.27 |
| 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 | Palms Sports PJSC | 10.32 | 10.26 | 0.6% | 9.07 |
| National Bank of Fujairah | 4.99 | 4.99 | 0.0% | 0.00 | Du | 5.80 | 5.67 | 2.3% | 0.68 |
| Sharjah Insurance | 1.38 | 1.38 | 0.0% | 0.00 | Waha Capital | 1.44 | 1.36 | 6.1% | 0.66 |
| National Bank of Umm Al Qaiwain | 1.85 | 1.85 | 0.0% | 0.00 | Insurance House | 0.87 | 0.81 | 7.7% | 0.00 |

Egypt

| Top 5 Gainers* | Last Price | 1d% | YTD% | Value (mn E£) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn E£) |
|---|------------|-------|----------|---------------|---|------------|--------|----------|-------------|
| | | | | | Ibnsina Pharma | 1.19 | -15.4% | -70.8% | 22.96 |
| | | | | | Credit Agricole | 4.32 | -10.7% | -48.7% | 12.05 |
| | | | | | MM Group For Ind And Intl Trade | 1.91 | -10.3% | -72.2% | 16.51 |
| | | | | | Citadel Capital - Common Shares | 0.98 | -10.1% | -5.9% | 0.70 |
| | | | | | Cairo For Inv And Real Estate Development | 10.55 | -6.2% | -18.4% | 10.62 |
| 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 | 13.32 | 13.32 | 0.0% | 3.50 | Cairo For Inv And Real Estate Devpt | 10.55 | 10.55 | 0.0% | 0.70 |
| Sidi Kerir Petrochemicals | 6.88 | 6.88 | 0.0% | 4.69 | Citadel Capital | 0.98 | 0.98 | 0.0% | 10.62 |
| Oriental Weavers | 6.40 | 6.40 | 0.0% | 3.16 | Commercial Intl Bank | 34.75 | 34.75 | 0.0% | 134.69 |
| Misr Fertilizers Production Company - Mopco | 94.04 | 94.04 | 0.0% | 2.14 | Credit Agricole | 4.32 | 4.32 | 0.0% | 12.05 |
| Heliopolis Housing | 4.73 | 4.73 | 0.0% | 14.69 | Eastern Company | 10.05 | 10.05 | 0.0% | 5.02 |

*No gainers on 4/7

India

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₹) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₹) |
|-----------------------|------------|---------|----------|--------------|-----------------------|------------|---------|----------|------------|
| HUL | 2370.00 | 3.8% | 0.4% | 5628.284 | ONGC | 126.15 | -3.7% | -11.4% | 10835.17 |
| Indusind Bank | 832.00 | 3.1% | -6.3% | 3919.13 | Tata Consultancy Svs. | 3234.70 | -2.4% | -13.5% | 8531.89 |
| Britannia Inds. | 3690.45 | 3.0% | 2.3% | 2247.87 | Tata Steel | 854.90 | -2.1% | -23.1% | 6601.20 |
| ITC | 291.50 | 2.5% | 33.7% | 11571.69 | Jsw Steel | 551.25 | -1.8% | -16.0% | 3320.88 |
| Icici Bank | 720.55 | 2.4% | -2.6% | 5931.94 | Cipla | 932.25 | -1.8% | -1.3% | 939.14 |
| 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 | 1089.70 | 1121.45 | -2.8% | 3038.85 | Kotak Mahindra Bank | 1672.40 | 1626.00 | 2.9% | 3117.16 |
| Maruti Suzuki India | 8440.00 | 9050.00 | -6.7% | 5246.23 | Tata Steel | 854.90 | 827.00 | 3.4% | 6601.20 |
| Eicher Motors | 2792.00 | 2994.00 | -6.7% | 1233.94 | Hcl Technologies | 985.00 | 944.05 | 4.3% | 2692.89 |
| Hero Motocorp | 2755.25 | 2968.95 | -7.2% | 1381.03 | Wipro | 420.00 | 402.05 | 4.5% | 1336.17 |
| Britannia Inds. | 3690.45 | 4153.00 | -11.1% | 2247.87 | Adani Ports And Sez. | 683.35 | 651.95 | 4.8% | 1272.98 |

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 | 9.90 | 9.8% | -29.8% | 0.15 | Nairobi Securities Exchange Plc | 6.98 | -3.6% | -7.2% | 0.11 |
| Safaricom Plc | 26.55 | 6.0% | -30.0% | 209.32 | Diamond Trust Bank Limited | 49.60 | -0.2% | -16.6% | 0.60 |
| Total Kenya Ltd | 23.40 | 4.0% | -6.4% | 0.03 | Bamburi Cement Limited | 34.35 | -0.1% | -9.6% | 0.30 |
| Kengen Limited | 3.50 | 2.9% | -16.5% | 0.10 | | | | | |
| KCB Group Plc | 40.00 | 2.6% | -12.0% | 71.31 | | | | | |
| 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% | 0.00 | Diamond Trust Bank Limited | 49.60 | 48.50 | 2.3% | 0.60 |
| Bamburi Cement Limited | 34.35 | 40.00 | -14.1% | 0.30 | Standard Chartered Bank Kenya Ltd | 124.00 | 121.00 | 2.5% | 10.74 |
| Total Kenya Ltd | 23.40 | 27.50 | -14.9% | 0.03 | NCBA Group Plc | 23.90 | 23.00 | 3.9% | 1.34 |
| Standard Chartered Bank Kenya Ltd | 124.00 | 148.75 | -16.6% | 10.74 | Kengen Limited | 3.50 | 3.35 | 4.5% | 0.10 |
| NCBA Group Plc | 23.90 | 29.00 | -17.6% | 1.34 | British American Tobacco Kenya Ltd | 420.00 | 400.00 | 5.0% | 0.34 |

Saudi Arabia

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn SAR) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn SAR) |
|---|------------|--------|----------|----------------|---|------------|--------|----------|--------------|
| Jadwa REIT Saudi Fund | 11.90 | 4.8% | -20.6% | 3.69 | Fawaz Abdulaziz Alhokair Co. | 18.74 | -10.0% | 20.4% | 54.64 |
| Dar Alarkan Real Estate Development Co. | 11.00 | 4.6% | 9.3% | 236.79 | Abdulmohsen Alhokair Grp for Trsm and Dev | 10.90 | -9.9% | -36.9% | 15.23 |
| Taleem REIT Fund | 12.02 | 2.7% | -2.3% | 1.08 | Saudi Enaya Coop Insurance Co. | 17.68 | -8.4% | -43.2% | 22.52 |
| Mobile Telecommunication Company Saudi Arabia | 11.54 | 2.7% | -4.2% | 21.46 | Al Gassim Investment Holding | 19.30 | -7.3% | -18.4% | 18.34 |
| Saudi Automotive Services Co. | 34.60 | 2.5% | 12.7% | 8.71 | Anaam International Holding Group | 20.52 | -6.1% | -74.9% | 19.21 |
| 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. | 159.80 | 159.80 | 0.0% | 9.07 | Al Kathiri Holding | 42.85 | 42.85 | 0.0% | 1.31 |
| Elm Co. | 253.40 | 253.40 | 0.0% | 38.13 | Naseej International Trading Co | 16.38 | 16.38 | 0.0% | 3.32 |
| Saudi Tadawul Group Holding Co. | 197.80 | 197.80 | 0.0% | 83.30 | Alkhabeer REIT Fund | 8.08 | 8.08 | 0.0% | 1.06 |
| ACWA POWER Co. | 147.40 | 147.40 | 0.0% | 50.69 | Allied Cooperative Insurance Group | 14.38 | 14.38 | 0.0% | 2.93 |
| The Saudi National Bank | 65.80 | 65.80 | 0.0% | 122.40 | Anaam International Holding Group | 20.52 | 20.52 | 0.0% | 19.21 |

South Africa

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn R) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn R) |
|------------------------------|------------|----------|----------|--------------|-------------------------------|------------|----------|----------|------------|
| Northam Platinum Ltd | 17970.00 | 7.5% | -14.2% | 14527.47 | Aspen Pharmacare Holdings Ltd | 13886.00 | -1.2% | -38.1% | 6991.41 |
| Sasol Ltd | 37300.00 | 6.8% | 44.0% | 50238.59 | Prosus NV | 108609.00 | -1.0% | -17.1% | 173773.21 |
| Impala Platinum Holdings Ltd | 18500.00 | 5.8% | -17.8% | 35735.64 | | | | | |
| Sibanye Stillwater Ltd | 4237.00 | 5.8% | -13.7% | 22423.91 | | | | | |
| Glencore PLC | 8695.00 | 5.4% | 7.1% | 29421.79 | | | | | |
| 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 | 21149.00 | 23636.00 | -10.5% | 13962.23 | NEPI Rockcastle PLC | 8600.00 | 8501.00 | 1.2% | 4944.22 |
| Investec PLC | 8660.00 | 9684.15 | -10.6% | 8786.31 | Growthpoint Properties Ltd | 1235.00 | 1207.00 | 2.3% | 6746.67 |
| Investec Ltd | 8672.00 | 9830.56 | -11.8% | 7914.62 | Sanlam Ltd | 5375.00 | 5200.00 | 3.4% | 17482.52 |
| Clicks Group Ltd | 28193.00 | 32943.00 | -14.4% | 17898.35 | SPAR Group Ltd/The | 13880.00 | 13400.00 | 3.6% | 4741.01 |
| Bid Corp Ltd | 30862.00 | 36098.00 | -14.5% | 6771.25 | Old Mutual Ltd | 1112.00 | 1071.38 | 3.8% | 6088.38 |

Vietnam

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₫) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₫) |
|---------------------------------------|------------|-----------|----------|--------------|---------------------------------------|------------|----------|----------|--------------|
| Saigon Securities Inc | 20200.00 | 2.5% | -56.1% | 398182.40 | Mobile World Inv. Corp | 67800.00 | -3.6% | 0.4% | 351305.70 |
| Vinamilk | 75100.00 | 1.9% | -11.6% | 235761.43 | Phu Nhuan Jewelry | 123800.00 | -3.4% | 30.1% | 99584.72 |
| Military Commercial Bank | 24600.00 | 1.7% | -14.9% | 155479.38 | Vietnam Rubber Group JSC | 22000.00 | -1.8% | -37.4% | 273750.40 |
| Sai Gon Thuong Tin Commercial | 22350.00 | 1.6% | -29.0% | 494665.85 | Hoa Phat Group JSC | 22000.00 | -1.8% | -37.4% | 273750.40 |
| Khang Dien House Trading & Investment | 35800.00 | 1.4% | -22.8% | 15487.08 | Phat Dat Real Estate Development Corp | 51600.00 | -1.5% | -26.1% | 81264.84 |
| Stocks near 52 w high | Last Price | 52w H | % Change | Value (mn ₫) | Stocks near 52 w Low | Last Price | 52w L | % Change | Value (mn ₫) |
| Phu Nhuan Jewelry | 123800.00 | 130421.95 | -5.1% | 99584.72 | Vingroup JSC | 72700.00 | 72000.00 | 1.0% | 55128.41 |
| FPT Corp | 86700.00 | 99083.29 | -12.5% | 87176.85 | Vietcombank | 74100.00 | 72386.80 | 2.4% | 55293.42 |
| Vietjet Aviation | 129600.00 | 149000.00 | -13.0% | 75841.92 | No Va Land Invest | 74000.00 | 72000.00 | 2.8% | 163258.80 |
| Saigon Beer Alcohol Beverage Corp. | 153500.00 | 181400.00 | -15.4% | 3192.80 | Vinhomes | 61000.00 | 57520.56 | 6.0% | 137628.20 |
| Mobile World Inv. Corp | 67800.00 | 80873.83 | -16.2% | 351305.70 | Phat Dat Real Estate Development Corp | 51600.00 | 48200.00 | 7.1% | 81264.84 |

Email: research@fsdhgroup.com • www.fsdhgroup.com

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