

# Daily Market Report

## 7 July 2022

### JSE

JSE All-Share advanced by 1.15% to close at 65,756.38 points on Wednesday, as the Industrial, Financial and Resources sectors recorded gains.

### BRVM

BRVM Composite Index closed at 207.12 points, down by 0.32% on Wednesday, with Total Côte d'Ivoire and Palm Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index slipped by 0.06% to close at 51,556.54 points on Wednesday, as the Insurance, Banking, Oil & Gas, and Consumer goods sectors recorded losses.

### EGX

EGX 30 Index was up by 0.15% to close at 8,670.12 points on Wednesday, amid Egyptian and Arab purchases.

### ESG

Casablanca ESG 10 Index jumped by 1.35% to close at 875.01 points on Wednesday.

## African Markets

**Nigeria:** NSE 30 Index decreased marginally by 0.09% and closed at 1,879.36 points on Wednesday. UBN and International Breweries were the top losers.

**Egypt:** EGX 30 Index was up by 0.15% to close at 8,670.12 points on Wednesday, amid Egyptian and Arab purchases.

**Kenya:** NSE 20 Index increased by 0.30% and closed at 1,649.91 points on Wednesday. KCB Group and Bamburi Cement were the top gainers.

**South Africa:** JSE Top 40 Index climbed by 1.27% to close at 59,702.98 points on Wednesday, as the Industrial, Financial and Resources sectors recorded gains.

## Capital Markets

**JSE**  
Johannesburg Stock Exchange ▲ 1.15%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▼ 0.32%

**NSE**  
Nigerian Stock Exchange ▼ 0.06%

**EGX**  
Egyptian Stock Exchange ▲ 0.15%

**ESG**  
Casablanca Stock Exchange ▲ 1.35%

## Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.83
<b>INTERBANK RATES</b>	
OPR	13.83 ▼
Overnight	14.00 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.21% to close at 9,251.11 points on Wednesday, as losses in the Real Estate, Consumer Discretionary, Industrials, Utilities, and Basic Materials sectors led shares lower. MSCI UAE decreased by 0.36% to close at 419.15 points.

**Vietnam:** VN-30 Index fell by 2.42% to close at 1,211.94 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam fell by 2.89% to close at 752.91 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.63% to close at 11,416.54 points on Wednesday, as gains in the Media & Publishing, Financial Services and Transport sectors led shares higher. MSCI Saudi Arabia increased by 0.63% to close at 1,585.20 points.

**India:** Nifty 50 Index advanced by 1.13% to close at 15,989.80 points on Wednesday, as gains in the Auto, Fast Moving Consumer Goods and Consumer Durables sectors led shares higher. MSCI India rose by 1.26% to close at 1,855.64 points.

## News

### Nigeria:

FG approves N22.45bn for Petroleum, Environment ministries  
Fidelity Bank takes over three Discos, FG intervenes  
FG partners Mixta Africa to reduce housing deficit

### Kenya:

PMI Declines Further in June Amidst Rising Inflation Pressures  
Minimum VAT set at 12pc and tax review done every five years  
Foreign outflows surge to Sh12bn in stocks rout

### Abu Dhabi:

UAE offers incentives to attract digital companies under new FDI programme  
TAQA to retain most oil & gas assets after strategic review  
ADX and Bahrain Bourse launch region's first digital exchange

### Saudi Arabia:

Saudi Telecom secures official approval for capital increase to \$13bn  
Saudi developer Jabal Omar plans \$1.4bn capital hike through debt conversion  
Saudi Advanced Petrochemical's Q222 net profit more than halves to \$29m

### Egypt:

Egypt's trade deficit declines 53% to \$1.7B in June  
PMI records 45.2 in June, records worst slump in business conditions for two years  
Egypt offers 4.4K industrial units for sale nationwide

### South Africa:

PMI inches to highest level in a year but business still under pressure  
Cell C recapitalisation gets the nod from bondholders  
Key South African Trade Route Blocked as Fuel Costs Surge

### India:

RBI unveils measures to curb rupee slump, boost forex inflows  
India and China funnel \$24 billion to Putin in energy spree  
Bajaj Fin's assets grow 31% to cross Rs 2L crore

### Vietnam:

PetroVietnam surpasses oil exploitation plan by 23% in H1  
Hai Phong striving to attract over 2.5 billion USD in FDI this year  
Hanoi GRDP up 7.79% in first half of 2022

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,251.11	-0.2%	-1.0%	-1.3%	9.0%	AED/USD	3.67	0.0%	0.0%
Egypt	8,670.12	0.1%	-6.0%	-6.0%	-27.2%	EGP/USD	18.88	-0.1%	20.2%
India	15,989.80	1.1%	1.5%	1.3%	-7.9%	INR/USD	79.31	-0.1%	6.7%
Kenya	1,649.91	0.3%	1.7%	2.3%	-13.3%	KES/USD	118.05	0.0%	4.3%
Nigeria	1,879.36	-0.1%	-0.5%	-0.4%	9.1%	NGN/USD	419.75	0.0%	1.5%
Saudi Arabia	11,416.54	0.6%	-0.9%	-0.9%	0.7%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,702.98	1.3%	0.1%	-0.7%	-11.0%	ZAR/USD	16.80	1.3%	5.3%
Vietnam	1,211.94	-2.4%	-3.2%	-3.0%	-21.1%	VND/USD	23,378.00	0.1%	2.6%

## MSCI Emerging Markets

MSCI Frontier	507.74	-0.9%	-1.6%	-1.9%	-23.7%	Brent Crude (\$)	100.69	-2.0%	29.5%
MSCI Frontier 100	1,183.30	-0.8%	-1.3%	-1.5%	-22.8%	Gold (\$)	1,736.50	-1.6%	-5.0%
MSCI Emerging	981.01	-1.1%	-1.2%	-2.0%	-20.4%	Copper (\$)	7,520.50	-1.9%	-22.6%
MSCI World (USD)	2,561.20	0.3%	0.05%	0.6%	-20.7%	Coffee (\$)	192.3	-2.6%	-3.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	3.40	3.0%	330.4%	14.09	UBN	5.55	-9.8%	-8.3%	14.28
Sterling	1.52	1.3%	1.3%	10.96	International Breweries	5.40	-5.3%	14.9%	20.20
Unilever	15.50	1.3%	15.7%	14.81	Fidelity	3.24	-1.2%	27.1%	16.77
UBA	7.50	0.7%	-6.3%	78.92	Guaranty	20.30	-0.7%	-21.9%	267.09
Access	9.50	0.5%	4.4%	22.68					
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%	3.50
Seplat Petroleum	1300.50	1300.50	0.0%	67.47	Nascon	11.00	11.00	0.0%	0.35
Okomu Oil	216.90	216.90	0.0%	2.73	Nestle	1400.00	1390.00	0.7%	0.68
Airtel Africa	1732.20	1767.00	-2.0%	210.61	Zenith	21.75	21.25	2.4%	156.93
BUA Cement	71.90	74.50	-3.5%	7.73	Access	9.50	9.20	3.3%	22.79

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ghitha Holding P.J.S.C.	85.90	8.1%	212.4%	48.95	Abu Dhabi Natnl for Building Materials	0.17	-9.2%	-32.5%	0.00
National Corp for Tourism and Hotels	2.70	8.0%	-10.0%	2.38	Abu Dhabi Ports Company	5.05	-6.0%	39.5%	23.81
Easylease motorcycle rentals	41.00	7.6%	41.4%	14.93	Sudatel Telecom	0.33	-5.2%	-6.9%	0.00
Abu Dhabi Islamic Bank	7.77	2.2%	13.1%	26.01	Abu Dhabi Aviation	4.50	-5.1%	-8.2%	6.23
Abu Dhabi National Oil Co.	4.19	2.0%	-1.9%	56.98	Al Seer Marine Supplies & Equipment	9.80	-4.3%	-29.5%	7.07
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	10.20	10.04	1.6%	8.19
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Du	5.84	5.67	3.0%	2.46
Sharjah Insurance	1.38	1.38	0.0%	0.00	Abu Dhabi Natnl for Building Materials	0.17	0.16	3.1%	0.00
National Bank of Umm Al Qaiwain	1.85	1.85	0.0%	0.00	Waha Capital	1.42	1.38	3.2%	0.45

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
GB AUTO	2.65	10.0%	-48.0%	15.83	Cleopatra Hospital Company	4.20	-4.6%	-14.6%	29.40
ELSWEDY ELECTRIC	5.95	6.4%	-39.5%	39.59	Housing & Development Bank	32.41	-4.5%	-26.4%	1.68
Egyptian Financial Group-HermesHolding Company	12.00	4.0%	-19.0%	18.70	Credit Agricole Egypt	4.22	-4.1%	-49.9%	9.22
Tenth Of Ramadan Pharma Industries&Diagnostic-Rameda	2.20	2.3%	-8.3%	2.00	E-finance For Digital and Fin Investments	11.47	-3.5%	-19.0%	18.70
Heliopolis Housing	4.94	2.3%	-26.4%	5.72	Fawry For Banking Tech And E Payment	2.86	-3.1%	-48.0%	15.83
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	13.22	13.22	0.0%	14.68	Cairo For Inv And Real Estate Dev	10.30	10.30	0.0%	6.33
Sidi Kerir Petrochemicals - SIDPEC	6.90	6.90	0.0%	1.45	Citadel Capital - Common Shares	1.01	1.01	0.0%	2.49
Oriental Weavers	6.40	6.40	0.0%	3.22	Commercial International Bank	34.80	34.80	0.0%	63.42
Misr Fertilizers ProductionCompany - Mopco	94.25	94.25	0.0%	3.75	Credit Agricole Egypt	4.22	4.22	0.0%	9.22
Heliopolis Housing	4.94	4.94	0.0%	5.72	Eastern Company	9.99	9.99	0.0%	2.92

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finance	5930.00	4.8%	-15.0%	13010.004	ONGC	121.25	-4.8%	-14.9%	7155.49
Bajaj Finserv	12069.00	4.7%	-26.4%	5658.60	Power Grid Corp Of India	211.50	-1.2%	3.5%	3036.65
Britannia Inds.	3828.00	4.7%	6.2%	3941.42	Hindalco Industries	341.75	-1.0%	-28.1%	7464.55
HUL	2505.00	4.3%	6.1%	11766.13	HDFC Life Insurance Company	559.20	-1.0%	-13.9%	1864.06
Eicher Motors	2914.00	3.9%	12.4%	3054.83	NTPC	139.70	-0.8%	12.3%	2202.00
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	289.30	293.30	-1.4%	5264.70	Wipro	416.60	402.05	3.6%	2187.77
Eicher Motors	2914.00	2994.00	-2.7%	3054.83	Tata Steel	859.00	827.00	3.9%	6903.32
Hero Motocorp	2838.00	2954.45	-3.9%	2079.63	Hcl Technologies	988.25	944.05	4.7%	2969.74
Maruti Suzuki India	8629.55	9050.00	-4.6%	8343.33	Kotak Mahindra Bank	1706.95	1626.00	5.0%	9414.55
Britannia Inds.	3828.00	4153.00	-7.8%	3941.42	Axis Bank	656.85	618.25	6.2%	4385.49

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
KCB Group Plc	41.95	3.3%	-7.7%	9.45	Diamond Trust Bank Limited	48.40	-2.3%	-18.7%	0.07
Bamburi Cement Limited	35.00	2.3%	-7.9%	0.36	WPP Scangroup Plc	3.18	-1.2%	-23.2%	0.01
Equity Group Holdings Plc	44.15	2.3%	-16.3%	89.59	British American Tobacco Kenya Ltd	415.00	-1.2%	-6.0%	0.62
Absa Bank Kenya	10.90	1.9%	-8.0%	0.42	Centum Investment Company Plc	10.20	-1.0%	-27.7%	0.38
The Cooperative Bank of Kenya Ltd	11.30	0.9%	-12.7%	1.70	East African Breweries Limited	138.00	-0.9%	-16.4%	4.22
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	48.40	48.00	0.8%	0.07
Bamburi Cement Limited	35.00	40.00	-12.5%	0.36	Standard Chartered Bank Kenya Ltd	124.00	121.00	2.5%	116.37
Absa Bank Kenya	10.90	12.95	-15.8%	0.42	British American Tobacco Kenya Ltd	415.00	400.00	3.8%	0.62
Standard Chartered Bank Kenya Ltd	124.00	148.75	-16.6%	116.37	NCBA Group Plc	24.00	23.00	4.3%	3.84
NCBA Group Plc	24.00	29.00	-17.2%	3.84	Kengen Limited	3.55	3.35	6.0%	0.64

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tanmiah Food Co.	73.30	6.9%	-10.7%	34.10	Saudi Ceramic Co.	38.95	-4.4%	-29.3%	20.14
Saudi Ground Services Co.	27.20	5.4%	-8.0%	14.86	Arabian Centres Co.	19.56	-3.9%	-13.4%	24.76
Al Hassan Ghazi Ibrahim Shaker Co.	17.02	5.3%	-23.2%	29.86	Eastern Province Cement Co.	43.50	-3.8%	-1.0%	2.10
Saudi Investment Bank	19.52	4.8%	-0.2%	12.54	Advanced Petrochemical Co.	47.60	-3.6%	-32.4%	43.89
Bank Aljazira	21.82	4.7%	13.1%	121.03	Red Sea International Co.	13.36	-3.2%	-36.7%	2.90
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.	162.80	162.80	0.0%	87.24	Al Kathiri Holding	42.55	42.55	0.0%	1.21
Elm Co.	260.00	260.00	0.0%	45.31	Naseej International Trading Co	16.32	16.32	0.0%	2.25
Saudi Tadawul Group Holding Co.	192.80	192.80	0.0%	45.97	Allied Coop Insurance Group	14.60	14.60	0.0%	1.62
ACWA POWER Co.	147.60	147.60	0.0%	52.39	Anaam International Holding Group	20.10	20.10	0.0%	8.90
The Saudi National Bank	67.40	67.40	0.0%	272.44	Gulf General Coop Insurance Co.	8.78	8.78	0.0%	3.42

## 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	17740.00	5.8%	-15.3%	14870.15	Discovery Ltd	12251.00	-3.1%	-14.7%	30085.36
Anglo American Platinum Ltd	145221.00	4.8%	-17.4%	23479.19	Sasol Ltd	34053.00	-1.8%	31.5%	51295.26
Sibanye Stillwater Ltd	4171.00	4.5%	-15.1%	28872.03	Naspers Ltd	262000.00	-1.7%	6.0%	462997.23
AngloGold Ashanti Ltd	24363.00	3.9%	-25.9%	32479.97	Sanlam Ltd	5086.00	-1.0%	-14.3%	21341.11
Mondi PLC	28814.00	3.3%	-27.1%	11931.82	Old Mutual Ltd	1075.00	-0.5%	-17.9%	13146.42
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	20758.00	23636.00	-12.2%	19672.77	Sanlam Ltd	5086.00	5065.00	0.4%	21341.11
MultiChoice Group	11880.00	13650.00	-13.0%	6885.49	Old Mutual Ltd	1075.00	1063.00	1.1%	13146.42
Naspers Ltd	262000.00	301297.00	-13.0%	462997.23	NEPI Rockcastle PLC	8715.00	8450.00	3.1%	34322.31
Clicks Group Ltd	28438.00	32943.00	-13.7%	28397.25	SPAR Group Ltd	13901.00	13400.00	3.7%	6233.76
Investec Ltd	8412.00	9830.56	-14.4%	4453.79	Mr Price Group Ltd	17849.00	17174.00	3.9%	11425.61

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	152600.00	1.2%	3.3%	9201.78	Petrovietnam Gas	95800.00	-7.0%	2.3%	161806.20
Vietjet Aviation	127100.00	1.0%	-0.9%	80428.88	Vincom Retail	26000.00	-7.0%	-13.6%	83480.80
BaoViet Holdings	53000.00	0.4%	-5.4%	79314.50	Vingroup JSC	67500.00	-6.6%	-29.0%	146589.75
Vinamilk	70700.00	0.04%	-13.9%	166859.07	Phu Nhuan Jewelry	112000.00	-5.6%	17.7%	114576.00
					Vietnam National Petroleum Group	38200.00	-4.9%	-29.1%	21819.84
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	112000.00	130421.95	-14.1%	114576.00	Vingroup JSC	67500.00	67500.00	0.0%	146589.75
Vietjet Aviation	127100.00	149000.00	-14.7%	80428.88	No Va Land Invest	73400.00	72000.00	1.9%	71007.16
FPT Corp	83500.00	99083.29	-15.7%	186405.40	Vinhomes	59100.00	57520.56	2.7%	397317.48
Saigon Beer Alcohol Beverage Corp.	152600.00	181400.00	-15.9%	9201.78	Vietnam National Petroleum Group	38200.00	37050.00	3.1%	21819.84
Asia Commercial JS Bank	24200.00	29760.00	-18.7%	48830.76	Vincom Retail	26000.00	25100.00	3.6%	83480.80

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