

# Daily Market Report

## 8 July 2022

### JSE

JSE All-Share surged by 3.27% to close at 67,909.31 points on Thursday, as the Industrial, Financial and Resources sectors recorded gains.

### BRVM

BRVM Composite Index closed at 207.92 points, up by 0.39% on Thursday, with Bollore Transport & Logistics and Filtisac Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share Index edged up by 0.01% to close at 51,563.73 points on Thursday, as the Banking, Consumer goods and Industrial sectors recorded gains.

### EGX

EGX 30 Index climbed by 1.09% to close at 8,764.25 points on Thursday, as the market added LE 3.88 billion to market cap, amid Egyptian and Arab purchases.

### ESG

Casablanca ESG 10 Index increased by 0.48% to close at 879.20 points on Thursday.

## African Markets

**Nigeria:** NSE 30 Index inched up by 0.03% and closed at 1,879.99 points on Thursday. Julius Berger and Access were the top gainers.

**Egypt:** EGX 30 Index climbed by 1.09% to close at 8,764.25 points on Thursday, as the market added LE 3.88 billion to market cap, amid Egyptian and Arab purchases.

**Kenya:** NSE 20 Index increased by 0.69% and closed at 1,661.31 points on Thursday. Total Kenya and Nation Media Group were the top gainers.

**South Africa:** JSE Top 40 Index surged by 3.46% to close at 61,771.44 points on Thursday, as the Industrial, Financial and Resources sectors recorded gains.

## Capital Markets

**JSE**  
Johannesburg Stock Exchange ▲ 3.27%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▲ 0.39%

**NSE**  
Nigerian Stock Exchange ▲ 0.01%

**EGX**  
Egyptian Stock Exchange ▲ 1.09%

**ESG**  
Casablanca Stock Exchange ▲ 0.48%

## Nigeria Key Indicators

	Current
Inflation	17.71%
Exchange Rate	₦ 415.83
<b>INTERBANK RATES</b>	
OPR	14.00 <span style="color: green;">▲</span>
Overnight	14.00 <span style="color: blue;">↔</span>

## Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.31% to close at 9,222.93 points on Thursday, as losses in the Telecom, Financials, and Basic Materials sectors led shares lower. MSCI UAE edged down by 0.003% to close at 419.14 points.

**Vietnam:** VN-30 Index advanced by 1.43% to close at 1,229.23 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam rose by 2.39% to close at 770.89 points.

**Saudi Arabia:** Tadawul All Share Index was closed on Thursday on account of Eid al-Adha.

**India:** Nifty 50 Index increased by 0.89% to close at 16,132.90 points on Thursday, as gains in the Metals, Consumer Durables and Real Estate sectors led shares higher. MSCI India increased by 0.73% to close at 1,869.09 points.

## News

### Nigeria:

Nigeria secures Lion's share of \$65bn W'Bank funding  
DMO lists \$1.25bn Eurobond on NGX, FMDQ  
Fed Govt eyes pension fund, borrowing to fund \$2.3tr infrastructure

### Kenya:

KRA exceeds its revenue target by Sh149bn  
Safaricom plans to pay Sh30bn dividend August  
Farmers to pay new tax in fresh Treasury policy

### Abu Dhabi:

Abu Dhabi and Colombia eye collaboration on energy  
SoftBank's Rajeev Misra to launch \$6bn fund backed by Abu Dhabi groups  
Etihad and Mashreq in deal over loyalty points

### Saudi Arabia:

Bahri raises \$1.04bln in SAR-denominated sukuk offering  
Saudi CMA nods to STC, Jabal Omar's capital hike  
BNY Mellon plans campaigns to woo investors into Saudi Arabia

### Egypt:

Annual inflation declines for 1st time in 7 months, records 14.7% in June  
CBE issues number of decisions to support digital transformation  
Egypt achieved primary surplus of LE98.5B in FY 2021-22: Finance min.

### South Africa:

Remgro offer for Mediclinic is a 'done deal'  
Bidvest scoops up Australian cleaning business for R1.8bn  
Rand weakens as it eyes R17 to the dollar amid recession fears

### India:

Akasa Air gets an airline license from DGCA, to start services in July  
HDFC Bank hikes MCLR by 0.20% in third consecutive increase in rates  
IL&FS to give creditors Rs 2k cr from Metro sale

### Vietnam:

Number of newly-established enterprises hits record high in H1 2022  
Budget collection reaches 66.7% of yearly estimates  
State budget faces 1.4 billion USD drop from fuel tax cuts

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,222.93	-0.3%	-1.3%	-1.6%	8.7%	AED/USD	3.67	0.0%	0.0%
Egypt	8,764.25	1.1%	-5.0%	-5.0%	-26.4%	EGP/USD	18.89	0.0%	20.2%
India	16,132.90	0.9%	2.4%	2.2%	-7.0%	INR/USD	79.18	-0.2%	6.5%
Kenya	1,661.31	0.7%	2.4%	3.0%	-12.7%	KES/USD	118.10	0.0%	4.4%
Nigeria	1,879.99	0.03%	-0.5%	-0.4%	9.2%	NGN/USD	419.75	0.0%	1.5%
Saudi Arabia	11,416.54	0.0%	-0.9%	-0.9%	0.7%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,771.44	3.5%	3.6%	2.8%	-7.9%	ZAR/USD	16.76	-0.2%	5.0%
Vietnam	1,229.23	1.4%	-1.8%	-1.6%	-20.0%	VND/USD	23,355.00	-0.1%	2.5%

## MSCI Emerging Markets

MSCI Frontier	512.89	1.0%	-0.6%	-0.9%	-22.9%	Brent Crude (\$)	104.65	3.9%	34.5%
MSCI Frontier 100	1,196.19	1.1%	-0.3%	-0.5%	-22.0%	Gold (\$)	1,739.70	0.2%	-4.9%
MSCI Emerging	994.34	1.4%	0.2%	-0.6%	-19.3%	Copper (\$)	7,822.50	4.0%	-19.5%
MSCI World (USD)	2,602.03	1.6%	1.64%	2.2%	-19.5%	Coffee (\$)	193.49	0.6%	-2.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.28	2.4%	29.3%	1.10	FBNH	10.60	-3.2%	-7.8%	19.42
Julius Berger	27.10	2.3%	21.3%	13.05	Fidelity	3.20	-1.2%	25.5%	4.92
Access	9.70	2.1%	6.6%	9.80	FCMB	3.20	-1.2%	7.4%	8.49
Sterling	1.54	1.3%	2.7%	14.08	United Capital PLC	12.70	-0.8%	28.3%	27.74
Guaranty	20.40	0.5%	-21.5%	396.76	UBA	7.45	-0.7%	-6.9%	51.37
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%	0.20	Cap	17.00	17.00	0.0%	0.33
Seplat Petroleum	1300.50	1300.50	0.0%	0.15	Nascon	11.00	11.00	0.0%	0.08
Okomu Oil	216.90	216.90	0.0%	7.62	Nestle	1400.00	1390.00	0.7%	5.37
Airtel Africa	1732.20	1767.00	-2.0%	572.19	Zenith	21.85	21.25	2.8%	85.11
BUA Cement	71.90	74.50	-3.5%	0.69	Stanbic IBTC	33.55	32.15	4.4%	1.14

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging	29.00	7.8%	122.4%	42.30	Gulf Cement	0.50	-9.2%	-29.3%	0.09
Abu Dhabi Aviation	4.80	6.7%	-2.0%	1.31	Esg Emirates Stallions Group	6.50	-4.4%	-18.8%	10.42
Al Seer Marine Supplies & Equipment Co	10.30	5.1%	-25.9%	13.78	Abu Dhabi Commercial Bank	8.21	-4.2%	-3.8%	36.08
Abu Dhabi National For Building Materials	0.18	4.2%	-29.7%	0.00	PALMS SPORTS	9.82	-3.7%	-19.6%	7.61
Adc Acquisition Corporation Pjsc Warrants	1.61	3.9%	114.7%	0.25	GHITHA HOLDING P.J.S.C.	83.65	-2.6%	204.2%	46.80
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	Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00
Insurance House	0.87	0.87	0.0%	0.00	National Bank of Fujairah	4.99	4.98	0.2%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Palms Sports PJSC	9.82	9.80	0.2%	7.49
Sharjah Insurance	1.38	1.38	0.0%	0.00	Waha Capital	1.39	1.38	1.0%	0.71
National Bank of Umm Al Qaiwain	1.85	1.85	0.0%	0.00	Du	5.78	5.67	1.9%	0.25

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Credit Agricole Egypt	4.44	5.2%	-47.3%	4.06	Medinet Nasr Housing	2.60	-5.1%	-11.0%	121.57
Palm Hills Development Company	1.19	4.3%	-40.1%	4.59	GB AUTO	2.62	-1.1%	-48.6%	10.94
MM Group For Industry And International Trade	2.05	2.5%	-70.2%	14.30	Heliopolis Housing	4.89	-1.0%	-27.1%	11.40
Citadel Capital - Common Shares	1.03	2.5%	-14.6%	3.93	Orascom Development Egypt	3.50	-0.9%	-25.8%	3.11
Commercial International Bank(Egypt)	35.60	2.3%	-32.8%	72.17	Housing & Development Bank	32.37	-0.1%	-72.0%	7.88
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%	0.26	Cairo For Investment And RealEstate Dev	10.30	10.30	0.0%	5.62
Sidi Kerir Petrochemicals - SIDPEC	6.94	6.94	0.0%	1.28	Citadel Capital - Common Shares	1.03	1.03	0.0%	3.93
Oriental Weavers	6.45	6.45	0.0%	3.11	Commercial International Bank	35.60	35.60	0.0%	72.17
Misr Fertilizers Production Company - Mopco	94.51	94.51	0.0%	3.65	Credit Agricole Egypt	4.44	4.44	0.0%	4.06
Heliopolis Housing	4.89	4.89	0.0%	11.40	Eastern Company	10.00	10.00	0.0%	2.67

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	364.40	6.9%	-23.4%	6567.083	Dr Reddys Lab	4335.00	-1.3%	-11.7%	1886.24
Titan Company	2129.95	5.8%	-15.6%	12608.22	Nestle India Limited	18180.20	-1.1%	-7.7%	951.84
Tata Steel	906.50	5.6%	-18.4%	9781.24	Cipla	935.00	-1.1%	-1.0%	1306.47
Jsw Steel	576.50	4.0%	-12.1%	2797.33	Bharti Airtel	687.10	-1.0%	0.5%	2405.61
Tata Motors	431.75	3.7%	-10.5%	7488.37	HUL	2476.00	-0.9%	4.9%	8338.49
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	1133.00	1138.95	-0.5%	5556.90	Wipro	420.95	402.05	4.7%	2253.14
Eicher Motors	2940.55	2994.00	-1.8%	1913.96	Hcl Technologies	992.00	944.05	5.1%	2964.07
Hero Motocorp	2842.00	2954.45	-3.8%	1088.59	Axis Bank	659.50	618.25	6.7%	7342.16
Maruti Suzuki India	8595.00	9050.00	-5.0%	4728.48	Kotak Mahindra Bank	1742.70	1626.00	7.2%	5487.13
Britannia Inds.	3800.00	4153.00	-8.5%	1992.95	Grasim Industries	1376.00	1276.60	7.8%	750.06

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	24.00	6.9%	-4.0%	0.24	Centum Investment Company Plc	10.00	-2.0%	-29.1%	1.23
Nation Media Group	18.50	4.8%	0.3%	0.12	Nairobi Securities Exchange Plc	6.82	-1.4%	-9.3%	0.37
Kenya Power & Lighting Limited	1.47	3.5%	-16.0%	0.09	British American Tobacco Kenya Ltd	410.25	-1.1%	-7.1%	94.89
Equity Group Holdings Plc	45.00	1.9%	-14.7%	107.02	Kengen Limited	3.51	-1.1%	-16.2%	0.99
KCB Group Plc	42.75	1.9%	-5.9%	290.33					
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	Diamond Trust Bank Limited	48.40	48.00	0.8%	0.00
Bamburi Cement Limited	35.45	40.00	-11.4%	0.26	British American Tobacco Kenya Ltd	410.25	400.00	2.6%	94.89
Total Kenya Ltd	24.00	27.50	-12.7%	0.24	Standard Chartered Bank Kenya Ltd	124.50	121.00	2.9%	3.49
KCB Group Plc	42.75	50.75	-15.8%	290.33	NCBA Group Plc	24.00	23.00	4.3%	5.19
Absa Bank Kenya	10.90	12.95	-15.8%	2.92	Kengen Limited	3.51	3.35	4.8%	0.99

## 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 Cooperative 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)
Sasol Ltd	37668.00	10.6%	45.4%	70516.87	Northam Platinum Ltd	17165.00	-3.2%	-18.1%	17699.59
Naspers Ltd	285325.00	8.9%	15.4%	316270.21	British American Tobacco PLC	68021.00	-1.5%	16.1%	31945.18
Prosus NV	121889.00	8.3%	-6.9%	213404.97	SPAR Group Ltd/The	13767.00	-1.0%	-17.6%	5877.04
Glencore PLC	8813.00	8.0%	8.6%	43670.38	Anglo American Platinum Ltd	143828.00	-1.0%	-18.2%	28616.74
Anglo American PLC	56860.00	7.8%	-11.8%	75920.32	Clicks Group Ltd	28176.00	-0.9%	-10.7%	21460.45
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)
Naspers Ltd	285325.00	301297.00	-5.3%	316270.21	SPAR Group Ltd/The	13767.00	13400.00	2.7%	5877.04
Bidvest Group Ltd/The	21323.00	23636.00	-9.8%	10904.67	Sanlam Ltd	5213.00	5065.00	2.9%	31380.04
Investec PLC	8563.00	9684.15	-11.6%	6436.18	Old Mutual Ltd	1108.00	1063.00	4.2%	9944.88
Investec Ltd	8656.00	9830.56	-11.9%	4116.41	Mr Price Group Ltd	17927.00	17174.00	4.4%	15409.13
MultiChoice Group	11845.00	13650.00	-13.2%	9574.73	NEPI Rockcastle PLC	8924.00	8450.00	5.6%	12521.92

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vincom Retail	27000.00	3.8%	-10.3%	64870.20	Petrovietnam Gas	94100.00	-1.8%	0.5%	59132.44
BaoViet Holdings	55000.00	3.8%	-1.8%	91393.50	FPT Corp	83100.00	-0.5%	7.2%	106891.53
Vietcombank	75500.00	3.7%	-4.2%	95009.20	Asia Commercial JS Bank	24150.00	-0.2%	-12.5%	60295.31
Phu Nhuan Jewelry	116000.00	3.6%	21.9%	71432.80					
Vingroup JSC	69800.00	3.4%	-26.6%	151752.18					
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	116000.00	130421.95	-11.1%	71432.80	No Va Land Invest	74000.00	72000.00	2.8%	127872.00
Vietjet Aviation	129300.00	149000.00	-13.2%	79260.90	Vingroup JSC	69800.00	66500.00	5.0%	151752.18
Saigon Beer Alcohol Beverage Corp.	156200.00	181400.00	-13.9%	8138.02	Vietnam National Petroleum Group	39000.00	37050.00	5.3%	16356.60
FPT Corp	83100.00	99083.29	-16.1%	106891.53	Vinhomes	61000.00	57520.56	6.0%	128026.80
Vinamilk	73000.00	87859.93	-16.9%	222620.80	Vietnam Rubber Group JSC	21750.00	20500.00	6.1%	235509.00

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