

Daily Market Report

1 August 2022

JSE

JSE All-Share Index increased by 0.47% to close at 68,934.00 points on Friday, as the Resources sector recorded gains.

BRVM

BRVM Composite Index closed at 209.87 points, down by 0.26% on Friday, with Nestle Côte d'Ivoire and Solibra Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index increased by 1.42% to close at 50,370.25 points on Friday, as the Banking, Insurance, Industrial, Consumer Goods, and Oil & Gas sectors recorded gains.

EGX

EGX 30 Index increased by 1.04% to close at 9,467.08 points on Sunday, as the market gained LE 5.3 billion of market cap, amid Egyptian and Arab purchases.

ESG

Casablanca ESG 10 Index inched down by 0.09% to close at 882.14 points on Friday.

African Markets

Nigeria: NSE 30 Index jumped by 1.76% and closed at 1,820.25 points on Friday. UBN and United Capital were the top gainers.

Egypt: EGX 30 Index increased by 1.04% to close at 9,467.08 points on Sunday, as the market gained LE 5.3 billion of market cap, amid Egyptian and Arab purchases.

Kenya: NSE 20 Index climbed by 1.17% and closed at 1,701.31 points on Friday. Stanbic Holdings and The Cooperative Bank of Kenya were the top gainers.

South Africa: JSE Top 40 Index increased by 0.49% to close at 62,473.81 points on Friday, as the Resources sector recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.47%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.26%

NSE

Nigerian Stock Exchange ▲ 1.42%

EGX

Egyptian Stock Exchange ▲ 1.04%

ESG

Casablanca Stock Exchange ▼ 0.09%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 416.37
INTERBANK RATES	
OPR	14.75 ▼
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 1.04% to close at 9,663.47 points on Friday, as gains in the Telecom, Financials, Real Estate, Industrials, Energy and Basic Materials sectors led shares higher. MSCI UAE advanced by 1.40% to close at 454.92 points.

Vietnam: VN-30 Index decreased by 0.33% to close at 1,232.00 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.75% to close at 777.75 points.

Saudi Arabia: Tadawul All Share Index increased by 0.36% to close at 12,199.08 points on Sunday, as gains in the Consumer Durables & Apparel, Pharma, Biotech & Life Science and Diversified Financials sectors led shares higher. MSCI Saudi Arabia increased by 0.35% to close at 1,684.95 points.

India: Nifty 50 Index advanced by 1.35% to close at 17,158.25 points on Friday, as gains in the Metals, Oil & Gas and Green Energy sectors led shares higher. MSCI India jumped by 1.50% to close at 1,998.87 points.

News

Nigeria:

DMO commemorates Eurobond, sukuk listings on NGX
FBN Holdings records N66bn profit in six months
FCMB Group posts 73.2% profit, leverages renewable energy

Kenya:

Inflation hits 8.3pc on soaring food and fuel prices
Airtel saves Sh2.5bn on taxes as earnings improve
Kenya Power Signs Power Purchase Agreement with Ethiopia

Abu Dhabi:

RAK Properties reports Dh194 million revenue in first half of 2022
UAE national banks provided \$190bn credit facilities to business sector
UAE petrol and diesel prices to decrease in August

Saudi Arabia:

Saudi GDP grows 11.8% year/year in Q2
Saudi-listed Bahri's profit soars 134% as shipping operations rebound
Al Rajhi Bank reports 21% profit hike in H1-22 initial financials

Egypt:

Egypt aims to increase petroleum production to 790 bln during new FY 22/23
Egypt's M2 money supply up 23.4% in June
Egyptian expats' remittances grow 2.1% YoY in 11 months: CBE

South Africa:

SA private sector credit growth beats expectations
Pepkor lifts sales steadily amid hurdle of disruption in SRD grants and KZN floods
Anglo American cuts dividend as interim earnings dwindle

India:

HDFC Q1 net up 22% at Rs 3.7k cr
RBI panel may go for 35-50bps hike, reversing Covid rate cuts
FPIs return after 9 months, buy ₹5k crore stocks in July

Vietnam:

Vietnam posts two-fold growth in agricultural trade surplus in 7 months
M&A deals light up property market in first half of 2022
Lending rates expected to be stable thanks to State support package

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,663.47	1.0%	0.0%	0.0%	13.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,467.08	1.0%	1.0%	0.0%	-20.5%	EGP/USD	18.92	0.0%	20.4%
India	17,158.25	1.4%	0.0%	0.0%	-1.1%	INR/USD	79.26	-0.6%	6.6%
Kenya	1,701.31	1.2%	0.0%	0.0%	-10.6%	KES/USD	118.90	0.1%	5.1%
Nigeria	1,820.25	1.8%	0.0%	0.0%	5.7%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,199.08	0.4%	0.4%	0.0%	7.7%	SAR/USD	3.76	0.0%	0.0%
South Africa	62,473.81	0.5%	0.0%	0.0%	-6.8%	ZAR/USD	16.66	0.4%	4.4%
Vietnam	1,232.00	-0.3%	0.0%	0.0%	-19.8%	VND/USD	23,340.00	-0.1%	2.4%

MSCI Emerging Markets

MSCI Frontier	520.36	0.2%	0.0%	0.0%	-21.8%	Brent Crude (\$)	103.97	-3.0%	33.7%
MSCI Frontier 100	1,216.28	0.4%	0.0%	0.0%	-20.7%	Gold (\$)	1,781.80	0.7%	-2.6%
MSCI Emerging	993.78	-0.4%	0.0%	0.0%	-19.3%	Copper (\$)	7,917.50	2.0%	-18.5%
MSCI World (USD)	2,746.37	1.3%	0.0%	0.0%	-15.0%	Coffee (\$)	192.01	-0.4%	-3.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBN	5.50	10.0%	-9.1%	2.90	P Z Cussons	8.50	-9.6%	39.3%	5.13
United Capital PLC	11.10	9.9%	12.1%	84.56	Wema	3.29	-8.4%	316.5%	22.05
Transnational Corporation	1.12	9.8%	13.1%	7.05	Custodian	6.50	-4.4%	-16.7%	1.49
Fidelity	3.18	9.7%	24.7%	31.18					
Zenith	20.70	9.5%	-17.2%	459.26					
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%	0.01	Cap	17.00	17.00	0.0%	0.71
Seplat Petroleum	1430.50	1430.50	0.0%	3.93	Nestle	1262.30	1262.30	0.0%	94.19
Okomu Oil	216.90	216.90	0.0%	1.05	Stanbic IBTC	28.40	28.40	0.0%	9.71
Airtel Africa	1905.40	1905.40	0.0%	38.57	Nascon	11.10	11.00	0.9%	0.52
BUA Cement	69.30	74.50	-7.0%	5.46	Custodian	6.50	6.20	4.8%	1.46

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sudatel Telecom	0.36	2.9%	1.4%	0.00	United Arab Bank	0.68	-6.9%	1.0%	12.12
Emirates Telecom	27.90	2.9%	-12.0%	89.29	Easylease motorcycle rentals	37.60	-3.1%	29.7%	12.48
BOROUGE PLC	2.94	2.8%	-2.0%	47.31	PALMS SPORTS	10.50	-2.8%	-14.1%	8.05
FERTIGLOBE PLC	4.79	2.4%	36.1%	18.50	Abu Dhabi Commercial Bank	9.12	-2.2%	6.9%	40.66
Abu Dhabi Ship Building	3.60	2.3%	-10.0%	0.17	Adc Acquisition Corp PJSC Shares	12.00	-1.5%	9.7%	0.07
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	Waha Capital	1.40	1.37	2.2%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sharjah Cement	0.60	0.58	4.0%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Abu Dhabi Natnl for Building Materials	0.16	0.15	4.6%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Heliopolis Housing	5.56	3.3%	-17.1%	23.98	Tenth of Ramadan Pharma Industries & Diagnostics	2.42	-2.8%	0.8%	5.28
Egyptian Financial Group-Hermes Holding Company	11.84	3.3%	-4.1%	27.43	GB AUTO	2.83	-2.1%	-44.5%	23.92
Ibnsina Pharma	1.54	2.5%	-55.8%	23.07	Abu Dhabi Islamic Bank- Egypt	12.34	-1.8%	-14.2%	2.48
ELSWEDY ELECTRIC	6.74	2.1%	-31.4%	6.48	Eastern Company	9.75	-1.0%	-9.0%	11.46
Cleopatra Hospital Company	4.28	1.9%	-13.0%	6.65	MM Grp For Industry And Intl Trade	2.51	-0.4%	-63.5%	17.13
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	2.87	3.00	-4.3%	21.55	Eastern Company	9.75	9.62	1.4%	11.46
Egyptian Kuwaiti Holding	22.40	25.50	-12.2%	0.03	Oriental Weavers	6.60	6.30	4.8%	3.77
Alexandria Mineral Oils Company	3.90	4.48	-12.9%	12.78	Telecom Egypt	13.57	12.77	6.3%	3.01
Misr Fertilizers Production Company - Mopco	99.12	114.00	-13.1%	17.05	Cleopatra Hospital Company	4.28	4.00	7.0%	6.65
Tenth Of Ramadan Pharma Industries & Diagnostic	2.42	2.93	-17.4%	5.28	Housing & Development Bank	33.74	31.01	8.8%	8.75

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
SBI Life Insurance	1294.00	8.6%	8.2%	9815.399	Dr Reddys Lab	4091.00	-4.0%	-16.6%	8090.93
Tata Steel	107.80	7.4%	-90.3%	17814.62	State Bank Of India	527.65	-0.9%	14.6%	6315.90
Hindalco Industries	416.00	6.0%	-12.5%	6334.25	Kotak Mahindra Bank	1814.00	-0.8%	1.0%	4360.27
Sun Pharma Industries	943.60	5.5%	11.6%	10487.37	Divi's Laboratories	3827.00	-0.6%	-18.2%	1561.53
Coal India	212.00	4.5%	45.2%	2597.56	Axis Bank	724.50	-0.2%	6.8%	4817.66
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	303.90	305.90	-0.7%	5126.56	Hcl Technologies	948.00	877.35	8.1%	3455.87
SBI Life Insurance	1294.00	1304.70	-0.8%	9815.40	Wipro	423.95	391.00	8.4%	3359.79
Sun Pharma Industries	943.60	967.05	-2.4%	10487.37	Tech Mahindra	1050.00	943.70	11.3%	6523.41
Mahindra & Mahindra	1162.65	1195.00	-2.7%	2601.87	HDFC Life Insurance Company	554.50	497.05	11.6%	7788.95
Eicher Motors	3079.25	3179.00	-3.1%	1770.10	Kotak Mahindra Bank	1814.00	1626.00	11.6%	4360.27

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	95.50	5.2%	9.5%	0.02	Total Kenya Ltd	22.40	-2.2%	-10.4%	0.02
The Cooperative Bank of Kenya Ltd	11.90	3.5%	-8.1%	0.74	British American Tobacco Kenya Ltd	440.00	-1.1%	-0.3%	1.98
KCB Group Plc	41.15	2.9%	-9.5%	8.05	Bamburi Cement Limited	33.10	-0.6%	-12.9%	1.70
WPP Scangroup Plc	3.44	1.8%	-16.9%	0.02	Kengen Limited	3.49	-0.3%	-16.7%	1.40
Centum Investment Company Plc	9.32	1.5%	-33.9%	0.61	Safaricom Plc	29.95	-0.2%	-21.1%	55.22
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)
Standard Chartered Bank Kenya Ltd	133.00	148.75	-10.6%	8.66	Diamond Trust Bank Limited	49.00	48.00	2.1%	0.22
Stanbic Holdings	95.50	108.00	-11.6%	0.02	Bamburi Cement Limited	33.10	32.00	3.4%	1.70
Equity Group Holdings Plc	48.00	55.00	-12.7%	410.61	Kenya Reinsurance Corporation Ltd	2.00	1.92	4.2%	0.15
NCBA Group Plc	24.95	29.00	-14.0%	0.72	Kengen Limited	3.49	3.35	4.2%	1.40
British American Tobacco Kenya Ltd	440.00	512.00	-14.1%	1.98	Kenya Power & Lighting Limited	1.40	1.30	7.7%	1.42

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Real Estate Co.	14.88	9.9%	-26.7%	118.96	Leejam Sports Co.	110.20	-1.6%	1.1%	27.25
Saudi Arabia Refineries Co.	102.80	9.8%	-25.3%	119.72	Saudi Airlines Catering Co.	77.90	-1.4%	0.0%	11.46
Development Works Food	215.40	7.2%	-23.7%	90.02	Riyad Bank	36.05	-1.2%	33.0%	20.40
Saudi Advanced Industries	38.25	7.1%	-19.5%	179.92	Etihad Etisalat Co.	37.35	-1.2%	19.9%	34.09
Al Hassan Ghazi Ibrahim Shaker Co.	19.48	6.8%	-12.1%	30.50	ACWA POWER Co.	173.00	-1.0%	106.0%	51.40
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.	176.80	176.80	0.0%	29.88	Alkhabeer REIT Fund	7.60	7.60	0.0%	5.44
Scientific and Medical Equipment House Co.	71.20	71.20	0.0%	26.99	Allied Cooperative Insurance Group	14.10	14.10	0.0%	3.23
Elm Co.	293.80	293.80	0.0%	49.33	CHUBB Arabia Coop Insurance Co.	19.00	19.00	0.0%	9.81
Almunajem Foods Co.	66.80	66.80	0.0%	27.28	Gulf General Coop Insurance Co.	8.92	8.92	0.0%	2.69
Saudi Tadawul Group Holding Co.	224.60	224.60	0.0%	61.02	Gulf Union Alahlia	9.00	9.00	0.0%	0.53

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American PLC	59936.00	4.7%	-7.1%	96493.78	Aspen Pharmacare Holdings Ltd	14520.00	-5.6%	-35.3%	24715.68
Impala Platinum Holdings Ltd	18455.00	4.5%	-18.0%	49386.89	Naspers Ltd	235643.00	-4.2%	-4.7%	377202.70
Northam Platinum Ltd	17642.00	3.8%	-15.8%	18743.16	British American Tobacco PLC	65400.00	-4.0%	11.6%	87026.15
Glencore PLC	9329.00	3.3%	15.0%	31468.80	Woolworths Holdings Ltd	5287.00	-3.2%	1.9%	27525.70
Mondi PLC	31372.00	2.9%	-20.6%	19447.38	Prosus NV	108000.00	-2.7%	-17.5%	118804.43
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	22424.00	24723.00	-9.3%	59202.95	SPAR Group Ltd/The	13426.00	12909.00	4.0%	21703.60
Bidvest Group Ltd/The	21378.00	23636.00	-9.6%	13949.17	Old Mutual Ltd	1134.00	1063.00	6.7%	23218.57
Investec Ltd	8873.00	9830.56	-9.7%	7106.65	Clicks Group Ltd	27981.00	26132.00	7.1%	18705.58
British American Tobacco PLC	65400.00	73123.00	-10.6%	87026.15	Sanlam Ltd	5451.00	5065.00	7.6%	23816.37
Remgro Ltd	13665.00	15485.00	-11.8%	20057.64	Woolworths Holdings Ltd	5287.00	4903.00	7.8%	27525.70

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	180000.00	4.0%	21.8%	30654.00	Vingroup JSC	64000.00	-4.5%	-32.7%	122144.00
Bank for Inv. and Devp	37300.00	2.2%	0.5%	155716.31	Masan Group Corp	106100.00	-3.5%	-25.0%	89134.61
BaoViet Holdings	57800.00	2.1%	3.2%	90439.66	Tien Phong Comm Joint Stock Bank	26600.00	-2.2%	-35.2%	80374.56
Vinhomes	59900.00	1.9%	-24.8%	193806.45	FPT Corp	83500.00	-1.6%	7.7%	162140.30
Techcombank	37900.00	1.6%	-24.2%	207930.77	Mobile World Inv. Corp	61000.00	-1.6%	-9.6%	205875.00
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.	180000.00	184500.00	-2.4%	30654.00	Vingroup JSC	64000.00	64000.00	0.0%	122144.00
Phu Nhuan Jewelry	114000.00	130421.95	-12.6%	132137.40	No Va Land Invest	74500.00	72000.00	3.5%	224170.50
Vietjet Aviation	125700.00	149000.00	-15.6%	61693.56	Vinhomes	59900.00	57520.56	4.1%	193806.45
FPT Corp	83500.00	99083.29	-15.7%	162140.30	Vietnam Rubber Group JSC	21500.00	20500.00	4.9%	442633.40
Asia Commercial JS Bank	24600.00	29480.00	-16.6%	93905.58	Hoa Phat Group JSC	21500.00	20500.00	4.9%	442633.40

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