

# Daily Market Report

## 2 August 2022

### JSE

JSE All-Share Index decreased by 0.42% to close at 68,642.56 points on Monday, as the Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 209.30 points, down by 0.27% on Monday, with Sicable Côte d'Ivoire and Uniwax Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index declined by 0.83% to close at 49,950.32 points on Monday, as the Industrial and Consumer Goods sectors recorded losses.

### EGX

EGX 30 Index decreased by 0.46% to close at 9,423.1 points on Monday, as the market lost LE 2.62 billion of market cap, amid foreign selling.

### ESG

Casablanca ESG 10 Index was down by 0.10% to close at 881.26 points on Monday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.42%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼ 0.27%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.83%
<b>EGX</b> Egyptian Stock Exchange	▼ 0.46%
<b>ESG</b> Casablanca Stock Exchange	▼ 0.10%

### African Markets

**Nigeria:** NSE 30 Index declined by 0.87% and closed at 1,804.35 points on Monday. BUA Cement and International Breweries were the top losers.

**Egypt:** EGX 30 Index decreased by 0.46% to close at 9,423.1 points on Monday, as the market lost LE 2.62 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index decreased by 0.25% and closed at 1,697.03 points on Monday. Kenya Power & Lighting and Safaricom were the top losers.

**South Africa:** JSE Top 40 Index decreased by 0.51% to close at 62,155.49 points on Monday, as the Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 416.90
<b>INTERBANK RATES</b>	
OPR	10.00 ▼
Overnight	10.50 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX Index advanced by 1.18% to close at 9,777.56 points on Monday, as gains in the Telecom, Financials, Consumer Discretionary, Industrials, Utilities and Basic Materials sectors led shares higher. MSCI UAE increased by 0.85% to close at 458.78 points.

**Vietnam:** VN-30 Index rose by 1.97% to close at 1,256.25 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam surged by 2.50% to close at 797.22 points.

**Saudi Arabia:** Tadawul All Share Index climbed by 1.15% to close at 12,338.95 points on Monday, as gains in the Consumer Durables & Apparel, Media and Entertainment, and Insurance sectors led shares higher. MSCI Saudi Arabia advanced by 1.26% to close at 1,706.14 points.

**India:** Nifty 50 Index increased by 1.06% to close at 17,340.05 points on Monday, as gains in the automobile sector led shares higher. MSCI India advanced by 1.20% to close at 2,022.85 points.

### News

#### Nigeria:

NNPC remits \$2.7bn to CBN in six months  
Wema Bank grows earnings by 50%  
Unity Bank posts N27b gross earnings in six months

#### Kenya:

Kenya & UAE Set to Sign a Trade Deal to Deepen Investment Ties  
India eyes Tullow Oil stake in Turkana for Sh356.5bn  
Treasury seeks Sh50bn from three reopened bonds

#### Abu Dhabi:

UAE telecoms co e& posts 1.5% rise in Q2 net profit as subscribers grow  
Third auction of UAE's dirham treasury bonds oversubscribed 5.1 times  
Etihad Cargo posts record 6% revenue growth in first half of 2022

#### Saudi Arabia:

Saudi Central Bank's assets jump to over \$505bn in June 2022  
Saudi Arabia's M3 monetary aggregate rises 8.9% to \$650bn  
Saudi Aramco to acquire Valvoline's lubricants business for \$2.65bn

#### Egypt:

Egypt Post, AXA sign agreement to study establishment of a micro-insurance co  
Egypt acquires Toyota's stake in Offshore Drilling Company  
Aldar Properties plans to expand land portfolio in Egypt within \$1.5B investment

#### South Africa:

SA factory activity shrinks in July during power crisis – Absa PMI  
Absa gets IFC loan to drive SA low-cost home mortgages  
Glencore as it keeps its guidance mainly unchanged

#### India:

ITC net profit jumps 38% to Rs 4,169 crore in Q1, sales up 41%  
5G spectrum auctions earn Centre record ₹1.5 lakh crore  
GST collections rises 28% to Rs 1.49 lakh crore in July

#### Vietnam:

Masan Group's profits up 123% in H1  
Vietjet reports positive performance in H1  
Reference exchange rate down 7 VND on August 2

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,777.56	1.2%	1.2%	1.2%	15.2%	AED/USD	3.67	0.0%	0.0%
Egypt	9,423.10	-0.5%	0.6%	-0.5%	-20.9%	EGP/USD	18.94	0.1%	20.6%
India	17,340.05	1.1%	1.1%	1.1%	-0.1%	INR/USD	79.03	-0.3%	6.3%
Kenya	1,697.03	-0.3%	-0.3%	-0.3%	-10.8%	KES/USD	119.00	0.1%	5.2%
Nigeria	1,804.35	-0.9%	-0.9%	-0.9%	4.8%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,338.95	1.1%	1.5%	1.1%	8.9%	SAR/USD	3.76	0.0%	0.0%
South Africa	62,155.49	-0.5%	-0.5%	-0.5%	-7.3%	ZAR/USD	16.45	-1.3%	3.1%
Vietnam	1,256.25	2.0%	2.0%	2.0%	-18.2%	VND/USD	23,360.00	0.1%	2.5%

## MSCI Emerging Markets

MSCI Frontier	525.99	1.1%	1.1%	1.1%	-21.0%	Brent Crude (\$)	100.03	-3.8%	28.6%
MSCI Frontier 100	1,228.26	1.0%	1.0%	1.0%	-19.9%	Gold (\$)	1,787.70	0.3%	-2.2%
MSCI Emerging	995.04	0.1%	0.1%	0.1%	-19.2%	Copper (\$)	7,819.50	-1.2%	-19.6%
MSCI World (USD)	2,749.26	0.1%	0.1%	0.1%	-14.9%	Coffee (\$)	192.02	0.01%	-3.3%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	11.90	7.2%	20.2%	44.62	BUA Cement	62.40	-10.0%	-6.9%	22.28
Transnational Corporation	1.17	4.5%	18.2%	8.07	International Breweries	5.00	-6.5%	6.4%	15.09
Unilever	14.60	2.8%	9.0%	58.28	UACN	10.50	-6.2%	9.4%	22.76
Zenith	21.00	1.4%	-16.0%	429.28	Sterling	1.50	-3.2%	0.0%	7.53
Guaranty	20.00	0.8%	-23.1%	426.79	Fidelity	3.12	-1.9%	22.4%	7.54
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%	0.52
Seplat Petroleum	1430.50	1430.50	0.0%	34.72	Nestle	1262.30	1262.30	0.0%	16.88
Okomu Oil	216.90	216.90	0.0%	83.04	Stanbic IBTC	28.40	28.40	0.0%	3.37
Airtel Africa	1905.40	1905.40	0.0%	9.74	Nascon	11.10	11.00	0.9%	0.98
Total	234.50	264.90	-11.5%	12.97	BUA Cement	62.40	61.20	2.0%	22.28

### 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	6.4%	37.9%	15.15	Abu Dhabi Ship Building	3.39	-5.8%	-15.3%	0.13
Invictus Investment Company	4.04	4.4%	0.2%	15.37	Gulf Cement	0.51	-5.5%	-26.6%	0.09
Manazel PJSC	0.40	3.4%	-23.5%	5.40	RAK Co. for White Cement & Cons	2.00	-4.8%	17.6%	0.20
FERTIGLOBE PLC	4.95	3.3%	40.6%	50.74	ADC Acquisition Corp PJSC Warrants	1.48	-4.5%	97.3%	0.23
International Holding	304.50	2.9%	100.3%	318.89	National Bank of Umm Al Qaiwain	1.82	-4.2%	-1.6%	0.73
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	7.00	0.7%	3.50
Insurance House	0.85	0.85	0.0%	0.00	Waha Capital	1.40	1.37	2.2%	0.47
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Abu Dhabi Ship Building	3.39	3.27	3.7%	0.13
Sharjah Insurance	1.38	1.38	0.0%	0.00	Sharjah Cement	0.60	0.58	4.0%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Abu Dhabi Natrl 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£)
GB AUTO	2.90	2.5%	-43.1%	57.49	Heliopolis Housing	5.35	-3.8%	-20.3%	24.48
E-finance For Digital and Financial Investments	14.25	2.2%	-29.8%	19.73	Orascom Development Egypt	3.74	-2.9%	-37.7%	1.72
Ibsina Pharma	1.57	2.0%	-54.9%	19.33	Medinet Nasr Housing	2.79	-2.8%	9.4%	35.12
Eastern Company	9.80	0.5%	-8.6%	8.84	Fawry For Banking Tech And E Payment	3.10	-2.5%	-55.3%	41.58
MM Group For Industry And International Trade	2.52	0.4%	-63.4%	28.12	Ezz Steel	12.10	-2.4%	-19.3%	10.15
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	2.79	3.00	-7.0%	35.12	Eastern Company	9.80	9.62	1.9%	8.84
Egyptian Kuwaiti Holding-EGP	22.40	25.50	-12.2%	0.29	Oriental Weavers	6.55	6.30	4.0%	4.24
Misr Fertilizers Production Company - Mopco	99.39	114.00	-12.8%	26.63	Cleopatra Hospital Company	4.19	4.00	4.8%	18.17
Alexandria Mineral Oils Company	3.89	4.48	-13.2%	11.24	Telecom Egypt	13.59	12.77	6.4%	37.00
Tenth Of Ramadan Pharma Industries & Diagnostic	2.41	2.93	-17.7%	4.25	Housing & Development Bank	33.48	31.01	8.0%	1.19

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	480.05	6.8%	-0.5%	20248.870	Sun Pharma Industries	916.25	-2.9%	8.3%	3881.24
Mahindra & Mahindra	1234.50	6.0%	47.5%	15659.80	HDFC Life Insurance Company	545.00	-1.9%	-16.1%	2461.05
Adani Ports And Sez.	801.00	4.9%	9.7%	5120.23	HUL	2597.00	-1.5%	10.0%	4055.46
Bharti Airtel	697.00	3.3%	1.9%	6079.23	Britannia Inds.	3861.00	-1.0%	7.1%	1246.58
ONGC	138.20	3.0%	-2.9%	2811.74	Divi's Laboratories Limited	3797.00	-0.9%	-18.8%	1390.41
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
SBI Life Insurance	1309.00	1317.25	-0.6%	3877.19	Hcl Technologies	952.65	877.35	8.6%	2370.64
Coal India	212.30	213.70	-0.7%	1663.56	HDFC Life Insurance Company	545.00	497.05	9.6%	2461.05
Maruti Suzuki India	8994.75	9085.00	-1.0%	9071.47	Wipro	430.50	391.00	10.1%	2212.00
Mahindra & Mahindra	1234.50	1248.70	-1.1%	15659.80	Tech Mahindra	1051.00	943.70	11.4%	2663.28
Bajaj Auto	3980.15	4091.00	-2.7%	1819.13	Tata Consultancy Svs.	3298.65	2953.00	11.7%	4308.47

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	23.05	2.9%	-7.8%	0.03	Kenya Power & Lighting Limited	1.36	-2.9%	-22.3%	6.97
Stanbic Holdings	97.50	2.1%	11.7%	0.10	Safaricom Plc	29.15	-2.7%	-23.2%	87.51
Absa Bank Kenya	11.25	1.8%	-5.1%	2.54	The Cooperative Bank of Kenya Ltd	11.65	-2.1%	-10.0%	1.71
Standard Chartered Bank Kenya Ltd	134.50	1.1%	4.9%	5.55	Nairobi Securities Exchange Plc	7.48	-1.6%	-0.5%	1.05
Bamburi Cement Limited	33.40	0.9%	-12.1%	0.67	Centum Investment Company Plc	9.18	-1.5%	-34.9%	0.31
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)
Standard Chartered Bank Kenya Ltd	134.50	148.75	-9.6%	5.55	Diamond Trust Bank Limited	49.00	48.00	2.1%	0.94
Stanbic Holdings	97.50	108.00	-9.7%	0.10	Kenya Reinsurance Corporation Ltd	2.00	1.92	4.2%	0.04
Absa Bank Kenya	11.25	12.95	-13.1%	2.54	Kengen Limited	3.49	3.35	4.2%	3.42
Equity Group Holdings Plc	47.70	55.00	-13.3%	1.50	Bamburi Cement Limited	33.40	32.00	4.4%	0.67
British American Tobacco Kenya Ltd	440.00	512.00	-14.1%	0.09	Kenya Power & Lighting Limited	1.36	1.30	4.6%	6.97

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arab Sea Information System Co.	80.00	9.9%	-59.2%	374.11	Dar Alarkan Real Estate Dev Co.	13.12	-1.7%	30.4%	275.36
Alinma Tokio Marine Co.	22.62	7.2%	-28.0%	36.93	Jadwa REIT Al Haramain Fund	7.40	-1.6%	-7.5%	1.50
Saudi Arabian Fertilizer Co.	45.35	7.1%	-55.7%	99.46	Saudi Tadawul Group Holding Co.	221.40	-1.4%	76.0%	73.43
Walaa Cooperative Insurance Co.	14.96	5.8%	-21.2%	16.81	Saudi Airlines Catering Co.	77.00	-1.2%	-1.2%	22.08
CHUBB Arabia Cooperative Insurance Co.	20.10	5.8%	-45.0%	11.57	Leejam Sports Co.	109.00	-1.1%	0.0%	36.71
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.	182.00	182.00	0.0%	52.75	Alkhabeer REIT Fund	7.69	7.69	0.0%	4.45
Scientific and Medical Equipment House Co.	73.00	73.00	0.0%	27.97	Allied Cooperative Insurance Group	14.38	14.38	0.0%	4.63
Elm Co.	295.20	295.20	0.0%	31.58	Gulf Union Alahlia	9.20	9.20	0.0%	1.58
Almunajem Foods Co.	67.40	67.40	0.0%	26.20	National Shipping Co of Saudi Arabia	24.48	24.48	0.0%	41.59
Saudi Tadawul Group Holding Co.	221.40	221.40	0.0%	73.43	Saudi Arabian Fertilizer Co.	45.35	45.35	0.0%	99.46

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	14226.00	2.3%	-16.7%	71520.96	Exxaro Resources	19432.00	-3.7%	27.1%	13130.75
Impala Platinum Holdings Ltd	18786.00	1.8%	-16.5%	60579.78	Anglo American PLC	57798.00	-3.6%	-10.4%	60169.34
Mondi PLC	31900.00	1.7%	-19.3%	107266.40	Discovery Ltd	12479.00	-2.7%	-13.1%	15655.27
Clicks Group Ltd	28359.00	1.4%	-10.1%	18942.28	Sasol Ltd	34035.00	-2.7%	31.4%	54801.63
Mr Price Group Ltd	18223.00	1.2%	-8.7%	13748.32	AngloGold Ashanti	24060.00	-2.3%	-26.8%	44285.56
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 Ltd	8953.00	9830.56	-8.9%	5614.70	SPAR Group Ltd/The	13421.00	12909.00	4.0%	8933.04
Bidvest Group Ltd/The	21496.00	23636.00	-9.1%	11087.66	Vodacom Group Ltd	13725.00	12983.00	5.7%	19895.43
Shoprite Holdings Ltd	22354.00	24723.00	-9.6%	29237.20	Old Mutual Ltd	1129.00	1063.00	6.2%	16487.57
British American Tobacco PLC	65191.00	73123.00	-10.8%	56770.15	Discovery Ltd	12479.00	11740.00	6.3%	15655.27
Remgro Ltd	13631.00	15485.00	-12.0%	11687.82	Sanlam Ltd	5433.00	5065.00	7.3%	19824.19

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers*	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	22800.00	6.8%	-50.5%	665073.72					
Hoa Phat Group JSC	22800.00	6.0%	-35.1%	869680.92					
Vietnam Rubber Group JSC	22800.00	6.0%	-35.1%	869680.92					
Vietnam JSC Bank	28700.00	5.5%	-15.3%	247907.73					
Bank for Inv. and Devp	39000.00	4.6%	5.1%	131328.60					
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	183000.00	184500.00	-0.8%	39271.80	Vingroup JSC	64700.00	64000.00	1.1%	81638.46
Phu Nhuan Jewelry	117000.00	130421.95	-10.3%	59810.40	No Va Land Invest	74700.00	72000.00	3.8%	181535.94
Vietjet Aviation	127100.00	149000.00	-14.7%	55771.48	Vinhomes	60000.00	57520.56	4.3%	102228.00
Asia Commercial JS Bank	25000.00	29480.00	-15.2%	111387.50	Vietnam Prosperity	29100.00	26500.00	9.8%	370425.54
FPT Corp	84000.00	99083.29	-15.2%	152468.40	Tien Phong Comm Joint Stock Bank	27250.00	24777.79	10.0%	52919.50

\*No losers on 1/8

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