

# Daily Market Report

## 3 August 2022

### JSE

JSE All-Share Index decreased by 0.93% to close at 68,002.25 points on Tuesday, as the Industrial, Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 209.12 points, down by 0.09% on Tuesday, with Servair Abidjan Côte d'Ivoire and Total Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index advanced by 1.35% to close at 50,626.04 points on Tuesday, as the Consumer Goods, Banking and Industrial sectors recorded gains.

### EGX

EGX 30 Index increased by 0.20% to close at 9,442.02 points on Tuesday, as the market added around LE 4.95 billion to market cap, amid Egyptian and Arab purchases.

### ESG

Casablanca ESG 10 Index was up by 0.10% to close at 882.11 points on Tuesday.

## African Markets

**Nigeria:** NSE 30 Index jumped by 1.51% and closed at 1,831.52 points on Tuesday. MTNN and Nestle were the top gainers.

**Egypt:** EGX 30 Index increased by 0.20% to close at 9,442.02 points on Tuesday, as the market added around LE 4.95 billion to market cap, amid Egyptian and Arab purchases.

**Kenya:** NSE 20 Index increased by 0.67% and closed at 1,708.36 points on Tuesday. Bamburi Cement and Kenya Power & Lighting were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.91% to close at 61,588.20 points on Tuesday, as the Industrial, Financial and Resources sectors recorded losses.

## Capital Markets

**JSE**  
Johannesburg Stock Exchange ▼ 0.93%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▼ 0.09%

**NSE**  
Nigerian Stock Exchange ▲ 1.35%

**EGX**  
Egyptian Stock Exchange ▲ 0.20%

**ESG**  
Casablanca Stock Exchange ▲ 0.10%

## Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 417.19
<b>INTERBANK RATES</b>	
OPR	14.33 ▲
Overnight	15.00 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX Index climbed by 1.20% to close at 9,894.84 points on Tuesday, as gains in the Financials, Real Estate, Industrials, Energy and Basic Materials sectors led shares higher. MSCI UAE decreased by 0.24% to close at 457.67 points.

**Vietnam:** VN-30 Index increased by 0.77% to close at 1,265.97 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.20% to close at 806.78 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.23% to close at 12,310.63 points on Tuesday, as losses in the Pharma, Biotech & Life Science, Consumer Durables & Apparel, and Capital Goods sectors led shares lower. MSCI Saudi Arabia was up by 0.10% to close at 1,707.81 points.

**India:** Nifty 50 Index inched up by 0.03% to close at 17,345.45 points on Tuesday, as gains in the Banking, Automobile and FMCG sectors led shares higher. MSCI India increased by 0.17% to close at 2,026.37 points.

## News

### Nigeria:

FG pays N405bn interest on CBN loans  
Bank borrowing from CBN rises 27% to N4.5tn  
Flour Mills Of Nigeria Announces N339.6bn Revenue In Q1

### Kenya:

Kenya's Banking Industry Assets Hit Record Ksh 6.0 Trillion  
KCB targets Equity with Sh15bn DRC bank acquisition  
Treasury owes oil marketers Sh39 billion in subsidy cash

### Abu Dhabi:

ADNOC's Fertiglobe raises H1-22 dividend from \$700m  
Abu Dhabi's Adia invests in food industry fund McWin and China's Taibang Biologic AD Ports enters deal to explore investments in GCC, Africa and Asia

### Saudi Arabia:

Saudi launches new investment marketing authority to support \$3.2tr plan  
Saudi competition authority approves 23% more M&A requests in Q2  
Saudi shipping firm Bahri signs two MoUs with Greek maritime logistics companies

### Egypt:

Suez Canal achieves highest monthly revenue in its history at \$704M  
Egypt raises targeted investments for transport sector by 27.5% in 22/23  
FRA mulls issuing securitized bonds worth LE 20B

### South Africa:

RBPlat H1 profit falls 58.1% on lower metal prices, soaring costs  
Sasol restarts SA's Natref refinery, ramping up output  
Telkom reports profit pressure as inflation and competition bite

### India:

Govt cuts windfall tax on fuel export, raises levy on domestic crude oil  
Trade deficit hits record \$31billion in July  
E-invoice cap for B2B GST to be halved to Rs 10 crore

### Vietnam:

CPI up 0.4% in July 2022  
Disbursed public investment up 22.5% in July  
July's retail sale of goods, services surges

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,894.84	1.2%	2.4%	2.4%	16.6%	AED/USD	3.67	0.0%	0.0%
Egypt	9,442.02	0.2%	0.8%	-0.3%	-20.7%	EGP/USD	19.02	0.4%	21.1%
India	17,345.45	0.03%	1.1%	1.1%	-0.05%	INR/USD	78.72	-0.4%	5.9%
Kenya	1,708.36	0.7%	0.4%	0.4%	-10.2%	KES/USD	119.00	0.0%	5.2%
Nigeria	1,831.52	1.5%	0.6%	0.6%	6.3%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,310.63	-0.2%	1.3%	0.9%	8.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	61,588.20	-0.9%	-1.4%	-1.4%	-8.1%	ZAR/USD	16.62	1.0%	4.1%
Vietnam	1,265.97	0.8%	2.8%	2.8%	-17.6%	VND/USD	23,358.00	0.0%	2.5%

## MSCI Emerging Markets

MSCI Frontier	526.66	0.1%	1.2%	1.2%	-20.9%	Brent Crude (\$)	100.54	0.5%	29.3%
MSCI Frontier 100	1,230.49	0.2%	1.2%	1.2%	-19.7%	Gold (\$)	1,789.70	0.1%	-2.1%
MSCI Emerging	984.32	-1.1%	-1.0%	-1.0%	-20.1%	Copper (\$)	7,806.50	-0.2%	-19.7%
MSCI World (USD)	2,728.30	-0.8%	-0.7%	-0.7%	-15.6%	Coffee (\$)	189.51	-1.3%	-4.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	1.85	7.6%	-17.0%	3.03	UBA	7.05	-2.1%	-11.9%	42.28
MTNN	215.00	7.4%	18.1%	659.07	FCMB	3.05	-1.6%	2.3%	3.52
UACN	11.00	4.8%	14.6%	44.98					
Wema	3.40	3.0%	330.4%	1.94					
Nestle	1300.00	3.0%	-8.1%	748.09					
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%	0.03	Cap	17.00	17.00	0.0%	0.10
Seplat Petroleum	1430.50	1430.50	0.0%	111.87	Stanbic IBTC	28.40	28.40	0.0%	8.81
Okomu Oil	216.90	216.90	0.0%	94.51	Nascon	11.10	11.00	0.9%	0.67
Airtel Africa	1905.40	1905.40	0.0%	17.06	BUA Cement	62.40	61.20	2.0%	33.32
Total	234.50	264.90	-11.5%	2.13	Nestle	1300.00	1262.30	3.0%	748.78

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
FERTIGLOBE PLC	5.33	7.7%	51.4%	89.54	National Corp for Tourism and Hotels	2.43	-10.0%	-19.0%	0.02
RAK Co. for White Cement & Construction	2.09	4.5%	22.9%	0.21	Easylease motorcycle rentals	37.00	-7.5%	27.6%	15.55
PALMS SPORTS	10.60	3.9%	-13.3%	4.00	Gulf Pharma Ind.	1.30	-5.1%	-29.3%	0.42
International Holding	316.20	3.8%	108.0%	349.89	Invictus Investment Co	3.90	-3.5%	-3.2%	12.11
RAK Properties PJSC	0.69	2.2%	-11.0%	2.45	ESG Emirates Stallions Grp	6.05	-2.4%	-24.4%	11.95
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	7.05	7.00	0.7%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Waha Capital	1.39	1.37	1.5%	1.17
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Abu Dhabi Natnl for Building Materials	0.16	0.15	3.3%	0.04
Sharjah Insurance	1.38	1.38	0.0%	0.00	Emirates Driving	19.96	19.00	5.1%	0.50
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ibsina Pharma	1.68	7.1%	-51.7%	46.51	Commercial International Bank	37.21	-2.1%	-29.8%	411.37
Citadel Capital - Common Shares	1.26	5.6%	4.8%	14.21	Cleopatra Hospital Company	4.11	-1.9%	-16.5%	5.20
Credit Agricole Egypt	5.58	5.1%	-33.7%	2.16	Telecom Egypt	13.41	-1.3%	-20.0%	18.67
Misr Fertilizers Production Company - Mopco	102.60	3.2%	5.2%	1.82	Medinet Nasr Housing	2.76	-1.1%	8.3%	42.97
MM Group For Industry And International Trade	2.59	2.8%	-62.4%	19.50	Orascom Development Egypt	3.70	-1.1%	-38.3%	1.49
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	2.76	3.00	-8.0%	42.97	Cleopatra Hospital Company	4.11	4.00	2.8%	5.20
Misr Fertilizers Production Company - Mopco	102.60	114.00	-10.0%	1.82	Oriental Weavers	6.48	6.30	2.9%	1.69
Egyptian Kuwaiti Holding	22.40	25.50	-12.2%	0.09	Eastern Company	9.92	9.62	3.1%	23.03
Alexandria Mineral Oils Company	3.89	4.48	-13.2%	3.86	Telecom Egypt	13.41	12.77	5.0%	18.67
Tenth Of Ramadan Pharma Industries & Diagnostic	2.42	2.93	-17.4%	2.13	Commercial International Bank	37.21	33.83	10.0%	411.37

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	1062.05	2.1%	19.6%	5382.318	UPL	736.95	-4.0%	-1.4%	4145.12
Asian Paints	3388.00	1.9%	0.1%	5566.04	Hero Motocorp	2771.00	-2.5%	12.5%	3148.46
NTPC	159.30	1.8%	28.1%	2899.21	SBI Life Insurance	1284.00	-2.2%	7.4%	2155.81
HUL	2631.10	1.5%	11.5%	3564.70	Britannia Inds.	3780.00	-2.0%	4.8%	1356.84
Maruti Suzuki India	9135.05	1.5%	23.0%	7703.42	Hindalco Industries	416.00	-1.9%	-12.5%	6432.88
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	1251.00	1259.75	-0.7%	6993.16	HDFC Life Insurance Company	537.30	497.05	8.1%	3149.71
Coal India	214.05	217.25	-1.5%	2709.46	Hcl Technologies	950.00	877.35	8.3%	2411.62
State Bank Of India	540.00	549.00	-1.6%	9119.39	Tech Mahindra	1030.40	943.70	9.2%	2899.43
Eicher Motors	3114.00	3179.00	-2.0%	5604.15	Wipro	428.35	391.00	9.6%	3627.46
Bajaj Auto	3998.25	4091.00	-2.3%	1581.96	Tata Consultancy Svs.	3284.00	2953.00	11.2%	4174.98

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	35.40	6.0%	-6.8%	0.04	Stanbic Holdings	95.50	-2.1%	9.5%	0.11
Kenya Power & Lighting Limited	1.44	5.9%	-17.7%	0.34	KCB Group Plc	40.05	-1.7%	-11.9%	10.14
Nairobi Securities Exchange Plc	7.70	2.9%	2.4%	0.19	Absa Bank Kenya	11.15	-0.9%	-5.9%	10.72
Nation Media Group	19.75	2.9%	7.0%	0.05	The Cooperative Bank of Kenya Ltd	11.55	-0.9%	-10.8%	3.05
Total Kenya Ltd	23.70	2.8%	-5.2%	0.01	East African Breweries Limited	154.25	-0.5%	-6.5%	29.31
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	134.75	148.75	-9.4%	3.71	Diamond Trust Bank Limited	49.00	48.00	2.1%	3.60
Bamburi Cement Limited	35.40	40.00	-11.5%	0.04	Kengen Limited	3.50	3.35	4.5%	1.98
Stanbic Holdings	95.50	108.00	-11.6%	0.11	Kenya Reinsurance Corporation Ltd	2.04	1.92	6.3%	0.08
Equity Group Holdings Plc	47.70	55.00	-13.3%	39.83	NCBA Group Plc	24.95	23.00	8.5%	2.12
Total Kenya Ltd	23.70	27.50	-13.8%	0.01	British American Tobacco Kenya Ltd	439.75	400.00	9.9%	7.17

## 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.	88.00	10.0%	-55.1%	397.74	Bank Aljazira	24.28	-7.3%	25.8%	450.24
Saudi Industrial Export Co.	41.80	7.7%	10.4%	293.86	Najran Cement Co.	14.66	-4.4%	-18.8%	30.11
Saudi Arabian Fertilizer Co.	48.85	7.7%	-52.3%	137.58	Arriyadh Development Co.	22.74	-3.2%	-10.5%	23.42
AlAhli REIT Fund 1	11.10	6.7%	-2.6%	2.70	Al Jouf Cement Co.	10.20	-3.0%	-6.3%	8.41
Naseej International Trading Co	35.40	6.6%	23.8%	49.60	Electrical Industries Co.	25.05	-2.5%	-9.2%	7.89
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%	36.07	Alkhabeer REIT Fund	7.65	7.65	0.0%	7.41
Scientific and Medical Equipment House Co.	72.10	72.10	0.0%	23.71	Allied Cooperative Insurance Group	14.80	14.80	0.0%	5.01
Elm Co.	292.20	292.20	0.0%	55.79	Gulf Union Alahlia	9.12	9.12	0.0%	0.61
Almunajem Foods Co.	67.00	67.00	0.0%	27.56	National Shipping Co of Saudi Arabia	24.48	24.48	0.0%	30.88
Saudi Tadawul Group Holding Co.	218.60	218.60	0.0%	77.12	Saudi Industrial Export Co.	41.80	41.80	0.0%	293.86

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	15838.00	3.5%	-9.1%	55493.01	Bidvest Group	20767.00	-3.4%	9.6%	34491.41
British American Tobacco PLC	66661.00	2.3%	13.8%	32426.11	Woolworths Holdings Ltd	5118.00	-3.0%	-1.3%	15541.00
Mondi PLC	32417.00	1.6%	-18.0%	56406.03	Mr Price Group Ltd	17694.00	-2.9%	-11.3%	16922.65
AngloGold Ashanti Ltd	24384.00	1.3%	-25.8%	77607.54	Glencore PLC	9090.00	-2.5%	12.0%	30888.88
Reinet Investments SCA	29178.00	0.9%	2.0%	7622.20	Sasol Ltd	33238.00	-2.3%	28.3%	82086.33
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)
British American Tobacco PLC	66661.00	73123.00	-8.8%	32426.11	SPAR Group Ltd/The	13171.00	12909.00	2.0%	5957.80
Investec Ltd	8859.00	9830.56	-9.9%	7880.79	Old Mutual Ltd	1105.00	1063.00	4.0%	25999.36
Shoprite Holdings Ltd	22257.00	24723.00	-10.0%	42202.41	Discovery Ltd	12228.00	11740.00	4.2%	17709.36
Bidvest Group Ltd/The	20767.00	23636.00	-12.1%	34491.41	Woolworths Holdings Ltd	5118.00	4903.00	4.4%	15541.00
Remgro Ltd	13536.00	15485.00	-12.6%	18257.57	Sanlam Ltd	5322.00	5065.00	5.1%	31629.93

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vinhomes	62500.00	4.2%	-21.6%	270012.50	Vietnam National Petroleum Group	41000.00	-1.9%	-23.9%	52295.50
Vingroup JSC	66600.00	2.9%	-30.0%	91415.16	Bank for Inv. and Devp	38500.00	-1.3%	3.8%	75144.30
Saigon Beer Alcohol Beverage Corp.	187800.00	2.6%	27.1%	43212.78	Sai Gon Thuong Tin Commercial	24950.00	-1.0%	-20.8%	464257.13
Vietcombank	78900.00	2.5%	0.1%	140268.42	Techcombank	38300.00	-0.8%	-23.4%	176559.17
PetroVietnam Power Corp	13750.00	1.9%	-21.4%	245444.38	BaoViet Holdings	58900.00	-0.5%	5.2%	61886.23
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.	187800.00	187900.00	-0.1%	43212.78	Vingroup JSC	66600.00	64000.00	4.1%	91415.16
Phu Nhuan Jewelry	116500.00	130421.95	-10.7%	49454.25	No Va Land Invest	75700.00	72000.00	5.1%	209446.76
FPT Corp	85000.00	99083.29	-14.2%	159774.50	Vinhomes	62500.00	57520.56	8.7%	270012.50
Vietjet Aviation	127500.00	149000.00	-14.4%	45989.25	Vietnam Prosperity	29050.00	26500.00	9.6%	347641.35
Asia Commercial JS Bank	24900.00	29480.00	-15.5%	84443.37	Vietnam National Petroleum Group	41000.00	37050.00	10.7%	52295.50

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