

Daily Market Report

4 August 2022

JSE

JSE All-Share Index increased by 0.89% to close at 68,610.56 points on Wednesday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 209.64 points, up by 0.25% on Wednesday, with Safca Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index slipped by 0.06% to close at 50,594.97 points on Wednesday, as the Industrial, Banking and Insurance sectors recorded losses.

EGX

EGX 30 Index advanced by 1.03% to close at 9,539.43 points on Wednesday, as the market added around LE 5.13 billion to market cap, amid Egyptian and Arab purchases.

ESG

Casablanca ESG 10 Index increased by 0.38% to close at 885.50 points on Wednesday.

African Markets

Nigeria: NSE 30 Index decreased marginally by 0.08% and closed at 1,830.02 points on Wednesday. Fidelity and BUA Cement were the top losers.

Egypt: EGX 30 Index advanced by 1.03% to close at 9,539.43 points on Wednesday, as the market added around LE 5.13 billion to market cap, amid Egyptian and Arab purchases.

Kenya: NSE 20 Index increased by 0.39% and closed at 1,714.97 points on Wednesday. WPP Scangroup and KCB Group were the top gainers.

South Africa: JSE Top 40 Index climbed by 0.99% to close at 62,199.10 points on Wednesday, as the Industrial and Financial sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.89%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.25%

NSE
Nigerian Stock Exchange ▼ 0.06%

EGX
Egyptian Stock Exchange ▲ 1.03%

ESG
Casablanca Stock Exchange ▲ 0.38%

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 417.19
INTERBANK RATES	
OPR	14.50 ▲
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.49% to close at 9,846.09 points on Wednesday, as losses in the Financials, Real Estate, Industrials, Energy, and Utilities sectors led shares lower. MSCI UAE was down by 0.17% to close at 456.89 points.

Vietnam: VN-30 Index increased by 0.30% to close at 1,269.83 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.59% to close at 811.54 points.

Saudi Arabia: Tadawul All Share Index was down by 0.15% to close at 12,291.93 points on Wednesday, as losses in the Media and Entertainment, Insurance, and Banking sectors led shares lower. MSCI Saudi Arabia decreased by 0.26% to close at 1,703.40 points.

India: Nifty 50 Index increased by 0.25% to close at 17,388.15 points on Wednesday, as gains in the IT and Financial Services sectors led shares higher. MSCI India increased by 0.17% to close at 2,029.74 points.

News

Nigeria:

Oil price falls, OPEC raises Nigeria's production quota
FG Approves PPP for Badagry Deep Seaport, to Generate \$53.6bn
NLNG Suffers \$7bn YTD Revenue Loss Due to Gas Supply Shortages

Kenya:

NCBA unveils Sh2bn electric car financing as e-mobility picks speed
Uhuru sets stage for Sh6bn US firm's investment in Kisumu solar plant
Shelter Afrique recovers Sh687m in troubled Kenyan housing projects

Abu Dhabi:

OPEC set to raise output by 100,000 bpd from September
UAE shines as 24 MENA IPOs raise \$13.5b in H1 2022
ADX collaborates with US-based portal TradingView to attract more investors

Saudi Arabia:

Saudi non-oil private sector growth slows in July but stays solid - PMI
Saudi telecom giant stc seeks shareholders' nod to hike capital to \$13bn
Saudi PIF agrees \$298mln investment in Omani PE fund

Egypt:

Egypt's PMI records 46.4 in July
Egypt, IMF in 'serious' negotiations over \$5-7 billion loan
\$27.29bn increase in non-govt bank deposits in local currency within 6 months

South Africa:

SA's business activity picks up for third straight month in July - PMI
TymeBank buys Retail Capital, expands business banking offering
Caxton unit acquires two Amcor operations

India:

Airtel 5G services rollout in Aug; inks pacts with Ericsson, Nokia, Samsung
Jio Platforms partners with Subex to augment 5G product line
IndiGo cuts loss to Rs 1,000 crore, revenue hits record Rs 13,000 crore

Vietnam:

THACO eyes revenue target of \$1 bln in 2025
Shipping firms report double-digit growth
Reference exchange rate continues going up on August 4

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,846.09	-0.5%	1.9%	1.9%	16.0%	AED/USD	3.67	0.0%	0.0%
Egypt	9,539.43	1.0%	1.8%	0.8%	-19.9%	EGP/USD	19.08	0.3%	21.5%
India	17,388.15	0.2%	1.3%	1.3%	0.2%	INR/USD	79.16	0.6%	6.5%
Kenya	1,714.97	0.4%	0.8%	0.8%	-9.9%	KES/USD	118.95	0.0%	5.1%
Nigeria	1,830.02	-0.1%	0.5%	0.5%	6.3%	NGN/USD	425.75	0.0%	2.9%
Saudi Arabia	12,291.93	-0.2%	1.1%	0.8%	8.5%	SAR/USD	3.76	0.1%	0.1%
South Africa	62,199.10	1.0%	-0.4%	-0.4%	-7.2%	ZAR/USD	16.87	1.5%	5.7%
Vietnam	1,269.83	0.3%	3.1%	3.1%	-17.3%	VND/USD	23,399.00	0.2%	2.7%

MSCI Emerging Markets

MSCI Frontier	527.87	0.2%	1.4%	1.4%	-20.7%	Brent Crude (\$)	96.78	-3.7%	24.4%
MSCI Frontier 100	1,234.64	0.3%	1.5%	1.5%	-19.5%	Gold (\$)	1,776.40	-0.7%	-2.9%
MSCI Emerging	985.81	0.2%	-0.8%	-0.8%	-20.0%	Copper (\$)	7,677.50	-1.7%	-21.0%
MSCI World (USD)	2,755.25	1.0%	0.3%	0.3%	-14.7%	Coffee (\$)	187.26	-1.2%	-5.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Sugar	17.00	6.3%	3.0%	25.84	Fidelity	3.00	-3.8%	17.6%	6.33
Lafarge Africa	24.90	6.2%	5.1%	74.78	BUA Cement	61.00	-2.2%	-9.0%	39.07
FCMB	3.10	1.6%	4.0%	6.40	Nigerian Breweries	47.15	-1.2%	-1.8%	132.66
Flour Mills	31.00	1.6%	9.3%	20.68	UBA	7.00	-0.7%	-12.5%	48.08
Axamansard	1.87	1.1%	-16.1%	2.04	MTNN	214.80	-0.1%	18.0%	2236.30
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%	0.15
Seplat Petroleum	1430.50	1430.50	0.0%	83.79	Stanbic IBTC	28.40	28.40	0.0%	2.91
Okomu Oil	216.90	216.90	0.0%	20.85	Nascon	11.10	11.00	0.9%	0.54
Airtel Africa	1905.40	1905.40	0.0%	578.29	Nestle	1300.00	1262.30	3.0%	43.25
Dangote Sugar	17.00	18.40	-7.6%	26.24	UBA	7.00	6.70	4.5%	47.64

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Multiply Group PJSC	2.04	11.5%	10.9%	227.37	Umm Al Qaiwain General Inv Co	1.17	-10.0%	1.7%	0.12
ARKAN BUILDING MATERIALS COMPANY	1.26	4.1%	-11.3%	32.23	RAK Co. for White Cement & Cons	2.00	-4.3%	17.6%	0.20
Easylease motorcycle rentals	38.50	4.1%	32.8%	16.38	ARAM GROUP	2.90	-3.3%	-6.5%	0.00
Gulf Pharmaceutical Ind.	1.35	3.9%	-26.6%	0.70	Sudatel Telecom	0.35	-2.8%	0.0%	0.04
PALMS SPORTS	10.80	1.9%	-11.6%	0.86	ESG Emirates Stallions Grp	5.91	-2.3%	-26.1%	11.37
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%	0.70
Insurance House	0.85	0.85	0.0%	0.00	Waha Capital	1.37	1.36	0.7%	3.20
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Abu Dhabi Natrl for Building Materials	0.16	0.15	3.3%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Emirates Driving Co.	19.96	19.00	5.1%	0.00
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£)
MM Group For Industry And International Trade	2.77	6.9%	-59.7%	34.35	Eastern Company	9.66	-2.6%	-9.9%	15.99
Orascom Development Egypt	3.92	5.9%	-34.7%	10.10	Abu Dhabi Islamic Bank- Egypt	12.06	-2.0%	-16.1%	0.93
Fawry For Banking Technology And Electronic Payment	3.28	4.1%	-52.7%	79.20	Egyptian Kuwaiti Holding-EGP	21.98	-1.9%	11.9%	1.52
E-finance For Digital and Financial Investments	14.98	4.0%	-26.2%	17.52	Alexandria Mineral Oils Company	3.87	-0.5%	5.7%	2.60
Tenth Of Ramadan Pharma Industries & Diagnostic	2.50	3.3%	4.2%	4.41	Cleopatra Hospital Company	4.10	-0.2%	-16.7%	6.81
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	2.80	3.00	-6.7%	34.38	Eastern Company	9.66	9.53	1.4%	15.99
Misr Fertilizers Production Company - Mopco	102.55	114.00	-10.0%	2.05	Cleopatra Hospital Company	4.10	4.00	2.5%	6.81
Alexandria Mineral Oils Company	3.87	4.48	-13.6%	2.60	Oriental Weavers	6.52	6.30	3.5%	7.37
Egyptian Kuwaiti Holding-EGP	21.98	25.50	-13.8%	1.52	Telecom Egypt	13.55	12.77	6.1%	6.02
Tenth Of Ramadan Pharma Industries & Diagnostic	2.50	2.93	-14.7%	4.41	Housing & Development Bank	34.14	31.01	10.1%	0.44

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1055.55	2.2%	-41.0%	3666.890	Sun Pharma Industries	896.90	-2.2%	6.1%	2583.49
Infosys	1569.90	1.7%	-16.8%	9368.07	Tata Motors	467.05	-1.9%	-3.2%	8918.03
Titan Company	2418.75	1.4%	-4.1%	2875.74	Kotak Mahindra Bank	1850.00	-1.8%	3.0%	4692.22
Tata Consultancy Svs.	3337.00	1.4%	-10.7%	9618.62	Maruti Suzuki India	8954.65	-1.7%	20.6%	6756.14
Asian Paints	3442.40	1.4%	1.8%	3987.71	Coal India	212.00	-1.5%	45.2%	2104.41
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Eicher Motors	3151.00	3179.00	-0.9%	3798.77	HDFC Life Insurance Company	535.05	497.05	7.6%	2210.41
State Bank Of India	540.50	549.00	-1.5%	13151.04	Hcl Technologies	957.00	877.35	9.1%	3940.62
Bajaj Auto	4001.00	4091.00	-2.2%	1244.98	Wipro	433.00	391.00	10.7%	2595.45
Coal India	212.00	217.25	-2.4%	2104.41	Tech Mahindra	1055.55	943.70	11.9%	3666.89
SBI Life Insurance	1283.45	1317.25	-2.6%	1795.32	Dr Reddys Lab	4102.00	3654.00	12.3%	2118.88

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	3.51	2.3%	-15.2%	0.01	Nairobi Securities Exchange Plc	7.58	-1.6%	0.8%	0.40
KCB Group Plc	40.75	1.7%	-10.3%	10.11	British American Tobacco Kenya Ltd	434.00	-1.3%	-1.7%	0.17
Bamburi Cement Limited	35.95	1.6%	-5.4%	0.39	Safaricom Plc	29.60	-0.5%	-22.0%	204.22
Centum Investment Company Plc	9.36	1.5%	-33.6%	6.30	Equity Group Holdings Plc	47.50	-0.4%	-10.0%	148.75
Total Kenya Ltd	24.00	1.3%	-4.0%	0.00	Diamond Trust Bank Limited	48.95	-0.1%	-17.7%	2.65
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	135.00	148.75	-9.2%	6.08	Diamond Trust Bank Limited	48.95	48.00	2.0%	2.65
Bamburi Cement Limited	35.95	40.00	-10.1%	0.39	Kengen Limited	3.50	3.35	4.5%	3.14
Stanbic Holdings	96.00	108.00	-11.1%	0.20	Kenya Reinsurance Corporation Ltd	2.05	1.92	6.8%	0.18
Total Kenya Ltd	24.00	27.50	-12.7%	0.00	British American Tobacco Kenya Ltd	434.00	400.00	8.5%	0.17
NCBA Group Plc	25.25	29.00	-12.9%	3.15	NCBA Group Plc	25.25	23.00	9.8%	3.15

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Fertilizer Co.	53.70	9.9%	-47.6%	145.11	Ash-Sharqiyah Development Co.	72.60	-4.1%	-23.3%	102.11
Baazeem Trading Co.	78.80	8.1%	-30.0%	160.62	Herfy Food Services	43.10	-4.0%	-30.9%	21.89
Almunajem Foods Co.	72.10	7.6%	24.1%	110.70	Al-Jouf Agricultural Development Co.	48.85	-2.9%	-16.4%	26.78
Saudi Vittrified Clay Pipes Co.	57.10	6.7%	-25.7%	64.41	Tabuk Agricultural Development Co.	20.72	-2.7%	-30.7%	13.81
Almasane Alkobra Mining Co.	91.60	5.7%	11.8%	416.73	Saudi Industrial Investment Group	28.05	-2.6%	-10.0%	40.06
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.	180.00	180.00	0.0%	28.86	Alkhabeer REIT Fund	7.66	7.66	0.0%	4.10
Scientific and Medical Equipment House Co.	72.10	72.10	0.0%	19.98	Allied Cooperative Insurance Group	14.84	14.84	0.0%	2.81
Elm Co.	292.20	292.20	0.0%	61.54	Gulf Union Alahlia	9.15	9.15	0.0%	0.41
Almunajem Foods Co.	72.10	72.10	0.0%	110.70	National Shipping Co. of Saudi Arabia	24.30	24.30	0.0%	20.53
Saudi Tadawul Group Holding Co.	220.00	220.00	0.0%	71.89	Saudi Industrial Export Co.	41.10	41.10	0.0%	322.33

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	242275.00	4.1%	-2.0%	204825.34	AngloGold Ashanti	23381.00	-4.1%	-28.9%	41198.05
Prosus NV	109649.00	3.7%	-16.3%	74095.20	Gold Fields Ltd	15239.00	-3.8%	-12.5%	65794.20
Absa Group Ltd	17268.00	2.8%	13.2%	72618.19	Impala Platinum Holdings Ltd	18200.00	-1.8%	-19.1%	31995.69
Discovery Ltd	12572.00	2.8%	-12.4%	13774.24	Sibanye Stillwater	3951.00	-0.9%	-19.5%	34862.21
Woolworths Holdings	#N/A	2.6%	1.3%	#REF!	Northam Platinum	17491.00	-0.8%	-16.5%	18352.61
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	66983.00	73123.00	-8.4%	27572.48	SPAR Group Ltd/The	13305.00	12909.00	3.1%	5684.95
Investec Ltd	8964.00	9830.56	-8.8%	4053.13	Vodacom Group Ltd	13763.00	12983.00	6.0%	13800.12
Shoprite Holdings Ltd	22206.00	24723.00	-10.2%	22827.15	Old Mutual Ltd	1127.00	1063.00	6.0%	13693.96
Bidvest Group Ltd/The	21032.00	23636.00	-11.0%	18070.80	Clicks Group Ltd	28457.00	26700.00	6.6%	15811.93
Remgro Ltd	13749.00	15485.00	-11.2%	12220.07	Discovery Ltd	12572.00	11740.00	7.1%	13774.24

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group JSC	23750.00	3.7%	-32.4%	1397592.50	Vinhomes	61900.00	-1.0%	-22.3%	124159.02
Vietnam Rubber Group JSC	23750.00	3.7%	-32.4%	1397592.50	Vingroup JSC	66000.00	-0.9%	-30.6%	82546.20
Petrovietnam Gas	112000.00	3.5%	19.6%	65363.20	BaoViet Holdings	58400.00	-0.8%	4.3%	60683.44
Bank for Inv. and Devp	39300.00	2.1%	5.9%	84345.66	Phu Nhuan Jewelry	116000.00	-0.4%	21.9%	76536.80
Sai Gon Thuong Tin Commercial	25450.00	2.0%	-19.2%	364914.83	Vietjet Aviation	127000.00	-0.4%	-1.0%	52387.50
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.	189900.00	191000.00	-0.6%	45613.98	Vingroup JSC	66000.00	64000.00	3.1%	82546.20
Phu Nhuan Jewelry	116000.00	130421.95	-11.1%	76536.80	No Va Land Invest	76200.00	72000.00	5.8%	233133.90
Petrovietnam Gas	112000.00	130442.43	-14.1%	65363.20	Vinhomes	61900.00	57520.56	7.6%	124159.02
FPT Corp	84800.00	99083.29	-14.4%	190757.60	Vietnam Prosperity	29000.00	26500.00	9.4%	377959.90
Vietjet Aviation	127000.00	149000.00	-14.8%	52387.50	Vietnam National Petroleum Group	40900.00	37050.00	10.4%	59002.34

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