

# Daily Market Report

## 5 August 2022

### JSE

JSE All-Share Index increased by 0.16% to close at 68,717.02 points on Thursday, as the Industrial sector recorded gains.

### BRVM

BRVM Composite Index closed at 208.35 points, down by 0.62% on Thursday, with Ecobank Transnational Inc and Bolloré Transport & Logistics being the top losers.

### NSE

NSE All-Share Index slipped by 0.03% to close at 50,582.30 points on Thursday, as the Industrial and Oil & Gas sectors recorded losses.

### EGX

EGX 30 Index surged by 5.28% to close at 10,043.23 points on Thursday, as the market added LE 22.09 billion to market cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index increased by 0.70% to close at 891.74 points on Thursday.

## African Markets

**Nigeria:** NSE 30 Index decreased marginally by 0.08% and closed at 1,828.50 points on Thursday. BUA Cement and Fidelity were the top losers.

**Egypt:** EGX 30 Index surged by 5.28% to close at 10,043.23 points on Thursday, as the market added LE 22.09 billion to market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index increased by 0.26% and closed at 1,719.40 points on Thursday. Bamburi Cement and Stanbic Holdings were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.21% to close at 62,327.03 points on Thursday, as the Industrial sector recorded gains.

## Capital Markets

**JSE**  
Johannesburg Stock Exchange ▲ 0.16%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▼ 0.62%

**NSE**  
Nigerian Stock Exchange ▼ 0.03%

**EGX**  
Egyptian Stock Exchange ▲ 5.28%

**ESG**  
Casablanca Stock Exchange ▲ 0.70%

## Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 418.07
<b>INTERBANK RATES</b>	
OPR	14.67 ▲
Overnight	15.00 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.28% to close at 9,818.15 points on Thursday, as losses in the Financials, Real Estate, Consumer Staples, Industrials, and Basic Materials sectors led shares lower. MSCI UAE decreased by 1.02% to close at 452.24 points.

**Vietnam:** VN-30 Index increased by 0.62% to close at 1,277.73 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.46% to close at 815.30 points.

**Saudi Arabia:** Tadawul All Share Index edged down by 0.003% to close at 12,291.93 points on Thursday, as losses in the Software & Services, Diversified Financials, and Media and Entertainment sectors led shares lower. MSCI Saudi Arabia slipped by 0.05% to close at 1,702.59 points.

**India:** Nifty 50 Index inched down by 0.04% to close at 17,382.00 points on Thursday, as losses in the Banking, Realty and Media sectors led shares lower. MSCI India was up by 0.16% to close at 2,032.90 points.

## News

### Nigeria:

CBN, banks, OPS mull new partnership for more funding  
Pension Asset Hits N14.27tn as Number of Contributors Approaches 10m Mark  
W'Bank commits \$8.5bn to Nigeria, faults N6.7tn subsidy

### Kenya:

Kenya's Private Sector Hits 15-Month Low in July Amid High Inflation – PMI  
Safaricom Set To Revamp Corporate Structure to Spur Expansion  
Listed firms raise dividend pay to Sh130 billion

### Abu Dhabi:

Agthia's second-quarter net profit surges 96% on higher revenue  
Waha Capital reports \$23.24m first-half profit amid global market turbulence  
Adnoc Drilling secures contracts worth \$3.4bn to boost offshore capacity

### Saudi Arabia:

Saudi Arabia posts almost \$21bn second-quarter surplus  
Saudi industrial program pumps \$100bn into various sectors  
Saudi Riyadh Bank's Q2 net profit up 7% but misses estimates

### Egypt:

Egypt's BOP deficit remains at \$13.6 bln in first 9 months of FY 2021/22: CBE  
UAE's Chimera acquires 56% of Egyptian Beltone shares by LE385M  
Egypt allocates 306.8 bln total investments to transport sector in 22/23 plan

### South Africa:

Business confidence hits three-month high  
Old Mutual acquires Preference Capital stake in bid to service SMME market  
Remgro and Mediclinic agree on buyout terms

### India:

Repo rate returns to pre-Pandemic levels with 50 bps hike  
LIC Hsg Fin Q1 profit rises 6x to Rs 925cr  
Adani buys Macquarie's toll roads for Rs 3,110 crore

### Vietnam:

Export-import turnover up 14.8% in first seven months  
Non-aviation service businesses enjoy profits in H1  
Japanese investment in Binh Duong almost reaches 6 billion USD

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,818.15	-0.3%	1.6%	1.6%	15.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,043.23	5.3%	7.2%	6.1%	-16.0%	EGP/USD	19.12	-0.2%	-17.9%
India	17,382.00	-0.04%	1.3%	1.3%	0.2%	INR/USD	79.02	0.6%	-5.9%
Kenya	1,719.40	0.3%	1.1%	1.1%	-9.6%	KES/USD	119.03	-0.1%	-4.9%
Nigeria	1,828.50	-0.1%	0.5%	0.5%	6.2%	NGN/USD	425.73	0.6%	-0.2%
Saudi Arabia	12,291.54	-0.003%	1.1%	0.8%	9.0%	SAR/USD	3.76	0.0%	-0.1%
South Africa	62,327.03	0.2%	-0.2%	-0.2%	-7.0%	ZAR/USD	16.61	0.0%	-4.1%
Vietnam	1,277.73	0.6%	3.7%	3.7%	-16.8%	VND/USD	23,398.00	0.0%	-2.4%

## MSCI Emerging Markets

MSCI Frontier	532.32	0.8%	2.3%	2.3%	-20.0%	Brent Crude (\$)	94.33	-2.5%	21.3%
MSCI Frontier 100	1,244.31	0.8%	2.3%	2.3%	-18.8%	Gold (\$)	1,806.90	1.7%	-1.2%
MSCI Emerging	994.59	0.9%	0.1%	0.1%	-19.3%	Copper (\$)	7,727.50	0.7%	-20.5%
MSCI World (USD)	2,761.65	0.2%	0.6%	0.6%	-14.5%	Coffee (\$)	189.85	1.4%	-4.4%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
P Z Cussons	9.35	10.0%	53.3%	4.83	BUA Cement	58.25	-4.5%	-13.1%	52.29
Stanbic IBTC	31.00	9.2%	-13.9%	9.42	Fidelity	2.91	-3.0%	14.1%	14.81
UBN	5.80	5.5%	-4.1%	1.96	Dangote Sugar	16.50	-2.9%	0.0%	8.34
Custodian	6.80	4.6%	-12.8%	3.16	Transnational Corporation	1.15	-1.7%	16.2%	12.91
UBA	7.25	3.6%	-9.4%	36.85	FBNH	10.90	-0.5%	-5.2%	51.48
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%	0.61
Seplat Petroleum	1430.50	1430.50	0.0%	148.89	Nascon	11.10	11.00	0.9%	0.99
Okomu Oil	216.90	216.90	0.0%	36.93	Nestle	1300.00	1262.30	3.0%	63.44
Airtel Africa	1905.40	1905.40	0.0%	3.13	BUA Cement	58.25	55.50	5.0%	54.61
Dangote Sugar	16.50	18.40	-10.3%	8.23	Access	9.00	8.45	6.5%	87.63

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
AL SEER MARINE SUPPLIES & EQUIPMENT CO	10.08	4.5%	-27.5%	6.13	PALMS SPORTS	10.20	-5.6%	-16.5%	1.61
Abu Dhabi National Energy	1.27	3.3%	-3.8%	9.22	Invictus Investment Company PLC	3.70	-4.6%	-8.2%	12.09
Abu Dhabi Aviation	4.88	2.1%	-0.4%	0.44	Sawaeed Holding PJSC	6.70	-4.3%	2.3%	1.34
Ras Al Khaimah Ceramics	2.97	1.4%	4.2%	3.41	Adc Acq Corp PJSC Warrants	1.40	-3.5%	86.7%	0.19
GHITHA HOLDING P.J.S.C.	85.10	1.3%	209.5%	46.32	Fertiglobe Plc	5.25	-3.3%	49.1%	39.14
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	Waha Capital	1.37	1.36	0.7%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Abu Dhabi Natnl for Building Materials	0.16	0.15	3.3%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Driving	19.98	19.00	5.2%	0.08
Sharjah Insurance	1.38	1.38	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Sawaeed Holding PJSC	7.05	6.70	5.2%	1.34

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers*	Last Price	1d%	YTD%	Val (mn E£)
E-finance For Digital and Financial Investments	17.78	18.7%	-12.4%	181.22					
Fawry For Banking Tech And Electronic Payment	3.89	18.6%	-43.9%	211.82					
Egyptian Kuwaiti Holding	24.50	11.5%	24.7%	36.11					
Cairo For Investment And RealEstate Development	12.00	11.1%	-11.8%	4.18					
T M G Holding	8.01	9.9%	-11.7%	40.52					
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	2.57	2.67	-3.9%	54.68	Cleopatra Hospital Company	4.13	4.00	3.3%	29.21
Egyptian Kuwaiti Holding-EGP	24.50	25.50	-3.9%	36.11	Eastern Company	9.89	9.53	3.8%	40.06
Misr Fertilizers ProductionCompany - Mopco	105.99	114.00	-7.0%	123.04	Oriental Weavers	6.68	6.30	6.0%	30.86
Tenth Of Ramadan Pharma Industries & Diagnostic	2.62	2.93	-10.6%	55.93	Telecom Egypt	13.83	12.77	8.3%	16.93
Alexandria Mineral Oils Company	3.95	4.48	-11.8%	11.45	Commercial International Bank	38.00	33.83	12.3%	291.55

\*No Losers on 4/8

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Cipla	1044.00	3.2%	10.6%	2962.318	NTPC	154.35	-3.3%	24.1%	2445.51
Nestle India Limited	19840.00	2.5%	0.7%	1740.94	Tata Consumer products Ltd.	788.00	-3.1%	6.0%	12139.07
Sun Pharma Industries	917.90	2.3%	8.5%	2869.64	Coal India	207.05	-2.4%	41.8%	1678.22
Infosys	1599.05	2.1%	-15.3%	11797.34	Shree Cement limited	20621.50	-1.6%	-23.6%	590.98
Apollo Hospitals Enterprise	4394.00	2.0%	-12.6%	1562.28	State Bank Of India	532.30	-1.6%	15.6%	9631.45
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	4006.00	4091.00	-2.1%	1243.90	HDFC Life Insurance Company	535.00	497.05	7.6%	2603.32
Eicher Motors	3128.10	3196.50	-2.1%	2919.74	Hcl Technologies	956.50	877.35	9.0%	3372.28
ITC	309.40	316.65	-2.3%	4918.15	Wipro	435.00	391.00	11.3%	3875.18
Maruti Suzuki India	8964.00	9196.85	-2.5%	5741.54	Tech Mahindra	1053.60	943.70	11.6%	5659.43
SBI Life Insurance	1278.90	1317.25	-2.9%	1299.36	Kotak Mahindra Bank	1830.25	1631.00	12.2%	4335.61

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	37.05	3.1%	-2.5%	0.28	Nairobi Securities Exchange Plc	7.50	-1.1%	-0.2%	0.07
Stanbic Holdings	97.50	1.6%	11.7%	0.15	Kenya Reinsurance Corporation Ltd	2.03	-1.0%	-11.7%	0.26
WPP Scangroup Plc	3.56	1.4%	-14.0%	0.26	Kenya Power & Lighting Limited	1.44	-0.7%	-17.7%	0.52
Safaricom Plc	30.00	1.4%	-20.9%	129.15	Centum Investment Company Plc	9.30	-0.6%	-34.0%	3.60
Absa Bank Kenya	11.35	1.3%	-4.2%	1.25	The Cooperative Bank of Kenya Ltd	11.55	-0.4%	-10.8%	5.82
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)
Bamburi Cement Limited	37.05	40.00	-7.4%	0.28	Diamond Trust Bank Limited	48.95	48.00	2.0%	2.71
Standard Chartered Bank Kenya Ltd	136.00	148.75	-8.6%	5.71	Kengen Limited	3.50	3.35	4.5%	1.90
Stanbic Holdings	97.50	108.00	-9.7%	0.15	Kenya Reinsurance Corporation Ltd	2.03	1.92	5.7%	0.26
Absa Bank Kenya	11.35	12.95	-12.4%	1.25	British American Tobacco Kenya Ltd	434.00	400.00	8.5%	6.81
NCBA Group Plc	25.40	29.00	-12.4%	1.34	NCBA Group Plc	25.40	23.00	10.4%	1.34

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Naseej International Trading Co	40.60	9.6%	42.0%	72.50	Saudi Arabian Fertilizer Co.	50.90	-5.2%	-50.3%	282.23
Red Sea International Co.	29.45	9.1%	39.4%	47.15	Saudi Industrial Investment Group	26.65	-5.0%	-14.4%	70.50
Tabuk Agricultural Development Co.	22.00	6.2%	-26.4%	31.49	Arabian Internet and Comm Services Co.	228.00	-3.6%	21.1%	22.91
Al Hassan Ghazi Ibrahim Shaker Co.	20.84	5.4%	-6.0%	27.50	Thob Al Aseel Co.	37.05	-2.8%	-23.0%	5.21
Amana Cooperative Insurance	12.90	4.7%	-62.5%	63.02	Baazeem Trading	77.00	-2.3%	-31.6%	120.56
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.	179.00	179.00	0.0%	17.65	Alkhabeer REIT Fund	7.70	7.70	0.0%	3.00
Scientific and Medical Equipment House Co.	74.10	74.10	0.0%	43.47	Allied Cooperative Insurance Group	15.16	15.16	0.0%	2.03
Elm Co.	293.20	293.20	0.0%	38.07	Gulf Union Alahlia	9.50	9.50	0.0%	5.31
Almunajem Foods Co.	70.90	70.90	0.0%	84.32	National Shipping Co of Saudi Arabia	24.36	24.36	0.0%	19.19
Saudi Tadawul Group Holding Co.	216.60	216.60	0.0%	42.97	Saudi Industrial Export Co.	41.50	41.50	0.0%	107.71

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sibanye Stillwater Ltd	4074.00	3.1%	-17.0%	35814.51	Mondi PLC	30939.00	-5.7%	-21.7%	49320.63
Standard Bank Group Ltd	16289.00	2.1%	16.3%	81911.48	Northam Platinum	16625.00	-5.0%	-20.6%	21319.82
Exxaro Resources Ltd	19421.00	2.1%	27.0%	27079.71	Reinet Investments	28500.00	-3.4%	-0.4%	10561.82
Glencore PLC	9290.00	2.1%	14.5%	88990.40	British American Tobacco PLC	65103.00	-2.8%	11.1%	43432.36
Cie Financiere Richemont SA	20053.00	2.0%	-16.9%	77356.63	Clicks Group Ltd	27780.00	-2.4%	-12.0%	21531.08
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	8908.00	9830.56	-9.4%	6348.01	Clicks Group Ltd	27780.00	26700.00	4.0%	21531.08
Absa Group Ltd	17504.00	19536.00	-10.4%	75616.37	Old Mutual Ltd	1114.00	1063.00	4.8%	13178.70
Shoprite Holdings Ltd	22085.00	24723.00	-10.7%	40333.84	SPAR Group Ltd/The	13556.00	12909.00	5.0%	9623.05
Bidvest Group Ltd/The	21056.00	23636.00	-10.9%	10599.84	Vodacom Group Ltd	13677.00	12983.00	5.3%	16635.08
British American Tobacco PLC	65103.00	73123.00	-11.0%	43432.36	Discovery Ltd	12423.00	11740.00	5.8%	10625.59

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietcombank	82500.00	3.8%	4.7%	186540.75	Petrovietnam Gas	109000.00	-2.7%	16.4%	83908.20
No Va Land Invest	78500.00	3.0%	-13.7%	288919.25	Saigon Beer Alcohol Beverage Corp.	185000.00	-2.6%	25.2%	54149.50
Vietnam National Petroleum Group	42100.00	2.9%	-21.9%	63617.31	Masan Group Corp	107900.00	-1.9%	-23.7%	171971.02
Tien Phong Commercial Joint Stock Bank	28800.00	2.9%	-29.8%	152965.44	Sai Gon Thuong Tin Commercial	25200.00	-1.0%	-20.0%	330805.44
Vinhomes	63000.00	1.8%	-20.9%	328790.70	Vietnam JSC Bank	28850.00	-0.9%	-14.9%	151199.97
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.	185000.00	191000.00	-3.1%	54149.50	Vingroup JSC	66400.00	64000.00	3.8%	76094.40
Phu Nhuan Jewelry	116000.00	130421.95	-11.1%	54485.20	No Va Land Invest	78500.00	72000.00	9.0%	288919.25
FPT Corp	86100.00	99083.29	-13.1%	262329.48	Vinhomes	63000.00	57520.56	9.5%	328790.70
Vietjet Aviation	129200.00	149000.00	-13.3%	95775.96	Vietnam Prosperity	29400.00	26500.00	10.9%	534150.96
No Va Land Invest	78500.00	91000.00	-13.7%	288919.25	Phat Dat Real Estate Development Corp	54000.00	48200.00	12.0%	99068.40

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