

Daily Market Report

9 August 2022

JSE

JSE All-Share Index increased by 1.07% to close at 70,266.13 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index was closed on Monday on account of Independence Day.

NSE

NSE All-Share Index decreased by 0.46% to close at 50,489.73 points on Monday, as the Banking and Industrial sectors recorded losses.

EGX

EGX 30 Index decreased by 0.75% to close at 10,047.71 points on Monday, as the market lost LE 1.3 billion of market cap, amid from Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.33% to close at 891.58 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.07%
BRVM Bourse Régionale des Valeurs Mobilières	↔ 0.00%
NSE Nigerian Stock Exchange	▼ 0.46%
EGX Egyptian Stock Exchange	▼ 0.75%
ESG Casablanca Stock Exchange	▼ 0.33%

African Markets

Nigeria: NSE 30 Index decreased by 0.62% and closed at 1,817.28 points on Monday. Zenith and MTNN were the top losers.

Egypt: EGX 30 Index decreased by 0.75% to close at 10,047.71 points on Monday, as the market lost LE 1.3 billion of market cap, amid from Arab and foreign selling.

Kenya: NSE 20 Index climbed by 1.04% and closed at 1,744.58 points on Monday. Stanbic Holdings and Equity Group Holdings were the top gainers.

South Africa: JSE Top 40 Index increased by 1.04% to close at 63,770.91 points on Monday, as the Industrial, Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 418.47
INTERBANK RATES	
OPR	14.75 ▲
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index jumped by 1.89% to close at 10,103.32 points on Monday, as gains in the Telecom, Financials, Real Estate, Consumer Discretionary Energy, Utilities, and Basic Materials sectors led shares higher. MSCI UAE advanced by 1.13% to close at 459.86 points.

Vietnam: VN-30 Index increased by 0.36% to close at 1,276.70 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam inched up by 0.04% to close at 812.30 points.

Saudi Arabia: Tadawul All Share Index increased by 0.66% to close at 12,297.29 points on Monday, as gains in the Retail, Industrial Investment and Building & Construction sectors led shares higher. MSCI Saudi Arabia rose by 0.97% to close at 1,711.82 points.

India: Nifty 50 Index increased by 0.73% to close at 17,525.10 points on Monday, as gains in the Capital Goods, Power and Metals sectors led shares higher. MSCI India increased by 0.59% to close at 2,045.31 points.

News

Nigeria:

Agric budgets hit N874.83bn, food imports gulp N7.81tn
CBN to Fund Focal Commodities to Strengthen Naira
Debt servicing to hit N10.43tn, economists slam FG

Kenya:

UAE fund unveils Sh3.5bn investment deal in Kenya
Kenya eyes US companies dumping China in Biden deal
Ahead of Polls, Kenya Shilling Hits Historic Low of 119.68 Against US Dollar

Abu Dhabi:

Abu Dhabi's IHC reports surge in Q2 net profit on aggressive business growth
UAE foreign ministry and Etihad Credit Ins to jointly promote trade and investment
Adnoc Distribution's second-quarter net profit surges 71% on revenue boost

Saudi Arabia:

Saudi's Red Sea Development awards \$8bn contracts for mega projects
Saudi National Water Company to roll out \$28.7bn projects
Saudi grocer BinDawood completes acquisition of 80.5% stake in France's

Egypt:

Egypt's exports of chemical and fertilizer industries hit \$4.336B in H122
Telecom Egypt : signs a national roaming agreement with Orange Egypt
Investments in stock portfolio records new outflow of about \$17.2B in 9 months

South Africa:

Implats expects lower annual earnings after decline in production
AngloGold's interim profit falls but says it is on track to meet its full-year guidance
Master Drilling forecasts robust interim earnings growth

India:

Reliance invests Rs 30K cr in retail in FY22; to accelerate store expansion, e-comm
HDFC hikes rate by 25 bps, sixth time in two months
IDFC, Indian Bank, Yes Bank put SpiceJet loans in high-risk category

Vietnam:

Vietnam's economic growth forecast at 7.5% in 2022: World Bank
Vietnamese firms tap into giant trade deal: official
Agro-forestry-fishery exports exceed 32 billion USD in first 7 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,103.32	1.9%	1.9%	4.6%	19.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,047.71	-0.8%	0.04%	6.1%	-15.9%	EGP/USD	19.14	-0.1%	-17.9%
India	17,525.10	0.7%	0.7%	2.1%	1.0%	INR/USD	79.65	-0.5%	-6.7%
Kenya	1,744.58	1.0%	1.0%	2.5%	-8.3%	KES/USD	119.20	-0.1%	-5.1%
Nigeria	1,817.28	-0.6%	-0.6%	-0.2%	5.5%	NGN/USD	425.35	0.0%	-0.1%
Saudi Arabia	12,297.29	0.7%	0.05%	0.8%	9.0%	SAR/USD	3.76	0.0%	-0.1%
South Africa	63,770.91	1.0%	1.0%	2.1%	-4.9%	ZAR/USD	16.61	0.5%	-4.1%
Vietnam	1,276.70	0.4%	0.4%	3.6%	-16.9%	VND/USD	23,397.00	0.0%	-2.4%

MSCI Emerging Markets

MSCI Frontier	531.96	0.2%	0.2%	2.2%	-20.1%	Brent Crude (\$)	96.65	1.8%	24.3%
MSCI Frontier 100	1,243.92	0.1%	0.1%	2.3%	-18.9%	Gold (\$)	1,805.20	0.8%	-1.3%
MSCI Emerging	1,001.79	-0.1%	-0.1%	0.8%	-18.7%	Copper (\$)	7,987.50	1.5%	-17.8%
MSCI World (USD)	2,758.72	0.2%	0.2%	0.4%	-14.6%	Coffee (\$)	189.47	-2.7%	-4.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	12.80	4.5%	29.3%	19.84	Transnational Corporation	1.08	-6.1%	9.1%	4.37
Flour Mills	32.90	2.8%	16.0%	35.01	Zenith	21.25	-3.0%	-15.0%	219.15
Dangote Sugar	16.55	0.3%	0.3%	14.67	MTNN	210.00	-2.3%	15.4%	194.59
Wema	3.35	0.3%	324.1%	4.93	FCMB	3.05	-1.9%	2.3%	1.94
					FBNH	10.80	-1.4%	-6.1%	820.15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.35	3.35	0.0%	4.93	Cap	17.00	15.25	11.5%	0.01
UACN	11.20	11.20	0.0%	12.65	Guaranty	20.50	18.00	13.9%	137.25
Transcorp Hotels	6.25	6.25	0.0%	0.01	Nascon	11.10	9.00	23.3%	0.39
Total	234.50	234.50	0.0%	6.72	UBN	5.80	4.65	24.7%	2.97
Seplat Petroleum	1430.50	1430.50	0.0%	122.39	Stanbic IBTC	31.00	24.50	26.5%	1.89

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
International Holding	340.00	5.3%	123.7%	427.41	Abu Dhabi Ports Company	4.92	-6.8%	35.9%	147.48
GFH FINANCIAL GROUP B.S.C	1.10	3.8%	-6.0%	1.10	Easylease motorcycle rentals	37.40	-2.9%	29.0%	14.94
Sharjah Islamic Bank	1.86	2.2%	-4.6%	2.46	Adnoc Drilling Company	3.58	-2.7%	5.3%	24.96
National Bank of Ras Al Khaimah	4.80	2.1%	6.7%	0.96	PALMS SPORTS	10.00	-2.3%	-18.2%	9.62
GHITHA HOLDING P.J.S.C.	83.60	2.0%	204.0%	41.98	ADC ACQ CORP PJSC WARRANTS	1.35	-2.2%	80.0%	0.04
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Al Buhaira Ntl Ins.	2.30	2.30	0.0%	0.00	Abu Dhabi Natrl for Building Materials	0.16	0.15	3.3%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Emirates Driving	19.98	19.00	5.2%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Sawaheed Holding	7.05	6.70	5.2%	0.00
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Waha Capital	1.31	1.24	5.6%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers*	Last Price	1d%	YTD%	Val (mn E£)
Orascom Development Egypt	7.07	4.9%	17.8%	30.99	Ibnsina Pharma	1.79	-4.9%	-56.0%	20.17
Abu Dhabi Islamic Bank-Egypt	9.39	4.0%	-40.5%	35.56	Cairo For Inv And RealEstate Dev	11.01	-4.8%	-19.1%	0.64
Eastern Company	10.20	2.5%	-4.9%	75.32	Fawry For Banking Tech And E Payment	3.83	-4.3%	-70.1%	83.29
Cleopatra Hospital Company	4.27	2.4%	-13.2%	40.20	Citadel Capital - Common Shares	1.25	-3.3%	3.6%	58.63
Housing & Development Bank	36.35	1.7%	-17.5%	2.03	E-finance For Digital and Fin Investments	16.38	-3.1%	-15.6%	139.04
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£)
Palm Hills Development Company	16.00	16.00	0.0%	0.05	Abu Dhabi Islamic Bank- Egypt	9.39	9.39	0.0%	35.56
Orascom Development Egypt	7.07	7.07	0.0%	30.99	Misr Fertilizers ProductionCompany - Mopco	2.60	2.60	0.0%	48.46
MM Group For Industry AndInternational Trade	104.89	104.89	0.0%	27.67	Oriental Weavers	1.35	1.35	0.0%	5.93
Medinet Nasr Housing	7.20	7.20	0.0%	0.60	Cleopatra Hospital Company	4.27	4.00	6.7%	40.20
Egyptian Kuwaiti Holding-EGP	24.50	25.50	-3.9%	0.27	Eastern Company	10.20	9.53	7.0%	75.32

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1275.60	3.2%	52.4%	6854.094	Bharat Petroleum	326.30	-3.0%	-15.3%	3067.42
Coal India	215.00	3.1%	47.2%	3491.48	State Bank Of India	520.10	-2.1%	13.0%	16869.68
Bajaj Finserv	15528.50	2.9%	-5.3%	7500.21	Britannia Inds.	3633.05	-1.5%	0.8%	1130.30
NTPC	159.90	2.8%	28.5%	2695.96	Ultratech Cement	6677.45	-1.4%	-12.0%	2101.22
Hindalco Industries	421.60	2.6%	-11.3%	3205.87	Hero Motocorp	2742.00	-1.0%	11.4%	1855.85
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Coal India	215.00	217.25	-1.0%	3491.48	HDFC Life Insurance Company	536.70	497.05	8.0%	1381.43
ITC	313.00	316.65	-1.2%	2597.23	Hcl Technologies	965.80	877.35	10.1%	1678.05
Bajaj Auto	4022.00	4091.00	-1.7%	959.13	Bharat Petroleum	326.30	293.35	11.2%	3067.42
Eicher Motors	3119.80	3196.50	-2.4%	1851.70	Wipro	436.40	391.00	11.6%	2087.69
Maruti Suzuki India	8914.90	9196.85	-3.1%	4649.10	Tech Mahindra	1056.95	943.70	12.0%	2727.75

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	106.00	10.4%	24.7%	0.01	Total Kenya Ltd	22.60	-3.8%	-5.8%	0.39
Equity Group Holdings Plc	51.50	6.7%	40.9%	5.11	Nation Media Group	19.05	-3.3%	23.3%	0.54
Nairobi Securities Exchange Plc	7.92	4.5%	-2.9%	0.11	Safaricom Plc	30.00	-0.3%	-12.4%	381.35
The Cooperative Bank of Kenya Ltd	12.25	2.9%	-2.0%	1.48					
British American Tobacco Kenya Ltd	445.00	2.5%	23.3%	0.49					
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)
Stanbic Holdings	106.00	108.00	-1.9%	0.01	Diamond Trust Bank Limited	49.00	48.00	2.1%	5.56
Bamburi Cement Limited	37.50	40.00	-6.3%	1.27	Kengen Limited	3.52	3.35	5.1%	2.77
Equity Group Holdings Plc	51.50	55.00	-6.4%	5.11	Kenya Reinsurance Corporation Ltd	2.05	1.92	6.8%	0.03
Standard Chartered Bank Kenya Ltd	138.25	148.75	-7.1%	1.99	Kenya Power & Lighting Limited	1.40	1.30	7.7%	3.75
Absa Bank Kenya	11.60	12.95	-10.4%	1.88	Total Kenya Ltd	22.60	20.65	9.4%	0.39

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Industrial Export Co.	47.40	10.0%	25.2%	295.11	Leejam Sports Co.	90.60	-6.1%	-16.9%	191.52
Naseej International Trading Co	43.30	8.1%	51.4%	55.29	Middle East Healthcare Co.	33.60	-4.3%	6.2%	19.29
Tihama Advertising and Public Relations Co.	115.00	6.3%	204.6%	64.58	United Cooperative Assurance Co.	10.16	-4.0%	-70.1%	25.80
Anaam International Holding Group	28.05	4.7%	-65.7%	162.07	United Wire Factories Co.	31.10	-3.7%	4.2%	11.86
Arab Sea Information System Co.	100.20	4.4%	-48.9%	261.61	Amana Cooperative Insurance Co.	12.20	-2.7%	-64.5%	16.39
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.	177.00	177.00	0.0%	24.44	Alkhabeer REIT Fund	7.60	7.60	0.0%	7.40
Scientific and Medical Equipment House Co.	72.50	72.50	0.0%	10.52	Allied Cooperative Insurance Group	15.10	15.10	0.0%	2.35
Elm Co.	283.00	283.00	0.0%	70.94	Gulf General Coop Insurance Co.	9.00	9.00	0.0%	3.36
Almunajem Foods Co.	69.20	69.20	0.0%	38.41	Gulf Union Alahlia	9.50	9.50	0.0%	0.39
Saudi Tadawul Group Holding Co.	214.80	214.80	0.0%	16.65	National Shipping Co of Saudi Arabia	24.84	24.84	0.0%	22.98

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
AngloGold Ashanti	26328.00	6.7%	-19.9%	50813.04	Capital&Counties	2899.00	-1.4%	-20.0%	447.61
Impala Platinum Holdings	19025.00	4.7%	-15.4%	32723.00	Nedbank Group	21746.00	-0.5%	24.2%	28487.26
African Rainbow Minerals	23781.00	3.4%	2.9%	8037.26					
Kumba Iron Ore	46916.00	3.1%	2.0%	11615.46					
Tiger Brands	16122.00	2.2%	-10.9%	3693.39					
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	9149.00	9830.56	-6.9%	2682.40	Vodacom Group Ltd	13762.00	12983.00	6.0%	21743.96
Shoprite Holdings Ltd	22933.00	24723.00	-7.2%	30271.56	SPAR Group Ltd/The	13819.00	12909.00	7.0%	3923.91
Absa Group Ltd	17924.00	19536.00	-8.3%	28319.92	Clicks Group Ltd	28630.00	26700.00	7.2%	12043.50
British American Tobacco PLC	66000.00	73123.00	-9.7%	11995.50	Old Mutual Ltd	1151.00	1063.00	8.3%	10128.80
Glencore PLC	9354.00	10594.00	-11.7%	23291.46	Woolworths Holdings Ltd	5330.00	4903.00	8.7%	8901.10

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam Prosperity	30000.00	2.2%	-16.2%	509705.88	Vingroup JSC	64600.00	-1.2%	-32.1%	65648.21
Sai Gon Thuong Tin Commercial	39200.00	2.1%	24.4%	313439.46	Vietjet Aviation	125200.00	-1.0%	-2.4%	48778.47
Vietnam National Petroleum Group	42450.00	1.9%	-21.2%	67767.57	PetroVietnam Power Corp	181000.00	-0.9%	934.3%	26860.41
Vietnam Rubber Group JSC	25100.00	1.4%	-32.1%	49025.14	Techcombank	28550.00	-0.9%	-42.9%	65558.16
Petrovietnam Gas	111000.00	1.4%	15.4%	38715.94	Vincom Retail	28700.00	-0.9%	-4.7%	26868.36
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietjet Aviation	125200.00	125200.00	0.0%	48778.47	Hoa Phat Group JSC	23600.00	23600.00	0.0%	715881.87
Vingroup JSC	64600.00	64600.00	0.0%	65648.21	Khang Dien House Trading & Investment	38600.00	38600.00	0.0%	25396.75
PetroVietnam Power Corp	181000.00	181000.00	0.0%	26860.41	Military Commercial Bank	27100.00	27100.00	0.0%	244351.32
Masan Group Corp	104800.00	104800.00	0.0%	66975.52	Vietnam National Petroleum Group	42450.00	42450.00	0.0%	67767.57
Petrovietnam Gas	111000.00	111000.00	0.0%	38715.94	Saigon Beer Alcohol Beverage Corp.	24650.00	24650.00	0.0%	527560.47

Email: research@fsdhgroup.com • www.fsdhgroup.com

DISCLAIMER

This publication is produced by FSDH Capital LTD solely for the information of users who are expected to make their own investment decisions without undue reliance on any information or opinions contained herein. The opinions contained in the report should not be interpreted as an offer to sell, or a solicitation of any offer to buy any investment. FSDH Capital LTD may invest substantially in securities of companies using information contained herein and may also perform or seek to perform investment services for companies mentioned herein. Whilst every care has been taken in preparing this document, no responsibility or liability is accepted by any member of the FSDH Capital LTD for actions taken as a result of information provided in this publication.