

Daily Market Report

15 August 2022

JSE

JSE All-Share declined by 0.75% to close at 70,731.32 points on Friday, as the Industrial and Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 208.43 points, up by 0.11% on Friday, with SMB Côte d'Ivoire and Crown Siem Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 0.70% to close at 49,664.07 points on Friday, as the Industrial, Banking, and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index slipped by 0.04% to close at 9,984.44 points on Sunday, amid selling from foreign institutions and investment funds.

ESG

Casablanca ESG 10 Index increased by 0.67% to close at 986.80 points on Friday.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.75%

BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.11%

NSE

Nigerian Stock Exchange

▼ 0.70%

EGX

Egyptian Stock Exchange

▼ 0.04%

ESG

Casablanca Stock Exchange

▲ 0.67%

African Markets

Nigeria: NSE 30 Index dropped by 1.27% and closed at 1,775.29 points on Friday. BUA Cement and Dangote Cement were the top losers.

Egypt: EGX 30 Index slipped by 0.04% to close at 9,984.44 points on Sunday, amid selling from foreign institutions and investment funds.

Kenya: NSE 20 Index was up by 0.18% and closed at 1,799.46 points on Friday. Stanbic Holdings and Centum Investment Company were the top gainers.

South Africa: JSE Top 40 Index declined by 0.96% to close at 63,996.11 points on Friday, as the Industrial and Resources sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	18.6%
Exchange Rate	₦ 419.72
INTERBANK RATES	
OPR	12.00 ▲
Overnight	13.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index decreased 0.51% by to close at 10,245.78 points on Friday, as losses in the Healthcare, Financials and Utilities sectors pushed shares lower. MSCI UAE was down by 0.15% to close at 466.76 points.

Vietnam: VN-30 Index increased by 0.68% to close at 1,280.96 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam rose by 0.82% to close at 817.46 points.

Saudi Arabia: Tadawul All Share Index was down 0.13% to close at 12,514.37 points on Sunday, as losses in the Healthcare, Financials and Energy sectors pulled shares lower. MSCI Saudi Arabia decreased by 0.21% to close at 1,742.47 points.

India: Nifty 50 Index increased by 0.22% to close at 17,698.15 points on Friday, as gains in the Oil & Gas, Metals and Public Sector Undertakings sectors led shares higher. MSCI India increased by 0.32% to close at 2,065.90 points.

News

Nigeria:

FG records N1.62tn fiscal deficit in three months
NNPC, IOCs sign agreements to generate \$500bn revenue
Nigeria's debt to World Bank rises by \$660m

Kenya:

Oil dealers to get Sh24.5 billion as fuel prices are retained
Insurers raise risk of exposure to Treasury bills and bonds at 72pc
Jubilee to get Sh270m from Mauritius unit stake sale

Abu Dhabi:

Abu Dhabi's H1 non-oil trade rises to \$33.8bln
AD Ports Group net profit surges 59% to Dhs300m in 2nd quarter
HSBC expands global securities services in ADGM

Saudi Arabia:

Saudi Aramco's Q2 net income surges 90% to \$48.4bln
Saudi banks increase loans by \$77.1bn in Q2
Saudi Arabia's Kingdom Holding invests in Russian energy companies

Egypt:

Egypt Considers Raising \$2.5 Billion as Economic Pressure Builds
Egypt plans to issue \$6bn in international bonds
Saudi-Egyptian Company announces its investment plan for MOPCO

South Africa:

SA government, business agree new push for growth pact
Discovery announces long-deferred medical aid increases
Mining and manufacturing production fall in June

India:

Retail inflation eases to 6.71% in July; IIP grows 12.3% in June
India's exports rise by 2.14% to \$36.27 billion in July
Imports up 46%, trade deficit hits record \$30 billion

Vietnam:

Vietnam, Laos enjoy 24.2% rise in two-way trade in 7 months
Việt Nam, Poland to expand trade and investment ties
Việt Nam seeks foreign investment in medical devices production

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,245.78	-0.5%	0.0%	6.0%	20.7%	AED/USD	3.67	0.0%	0.0%
Egypt	9,984.44	-0.04%	-0.04%	5.5%	-16.2%	EGP/USD	19.14	0.0%	-17.9%
India	17,698.15	0.2%	0.0%	3.1%	2.0%	INR/USD	79.66	0.0%	-6.7%
Kenya	1,799.46	0.2%	0.0%	5.8%	-5.4%	KES/USD	119.31	0.0%	-5.2%
Nigeria	1,775.29	-1.3%	0.0%	-2.5%	3.1%	NGN/USD	427.92	-0.3%	-0.7%
Saudi Arabia	12,514.37	-0.1%	-0.1%	2.6%	10.4%	SAR/USD	3.76	0.0%	0.0%
South Africa	63,996.11	-1.0%	0.0%	2.4%	-4.6%	ZAR/USD	16.17	0.4%	-1.4%
Vietnam	1,262.33	0.8%	0.0%	4.6%	-15.7%	VND/USD	23,395.00	0.0%	-2.4%

MSCI Emerging Markets

MSCI Frontier	536.24	-0.04%	0.0%	3.1%	-19.4%	Brent Crude (\$)	98.15	-1.5%	26.2%
MSCI Frontier 100	1,253.98	0.07%	0.0%	3.1%	-18.2%	Gold (\$)	1,815.50	0.5%	-0.7%
MSCI Emerging	1,016.83	0.2%	0.0%	2.3%	-17.5%	Copper (\$)	8,091.50	-1.0%	-16.8%
MSCI World (USD)	2,834.51	1.2%	0.0%	3.2%	-12.3%	Coffee (\$)	201.06	1.8%	1.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	24.95	6.2%	5.3%	18.43	BUA Cement	52.95	-9.9%	-21.0%	114.62
Sterling	1.51	2.7%	0.7%	10.10	Transnational Corporation	1.07	-2.7%	8.1%	7.17
FBNH	11.00	1.4%	-4.3%	333.24	Dangote Cement	258.80	-2.3%	0.7%	90.78
UBA	7.05	0.7%	-11.9%	92.68	Wema	3.51	-2.0%	344.3%	9.29
					International Breweries	5.10	-1.9%	8.5%	5.41
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.51	3.51	0.0%	9.29	Cap	17.00	15.25	11.5%	1.53
UACN	10.80	10.80	0.0%	14.09	Guaranty	20.40	18.00	13.3%	154.04
Transcorp Hotels	6.25	6.25	0.0%	0.01	Stanbic IBTC	28.00	24.50	14.3%	60.53
Total	234.50	234.50	0.0%	20.01	Nascon	11.10	9.00	23.3%	0.12
Seplat Petroleum	1430.50	1430.50	0.0%	4.11	UBN	5.80	4.65	24.7%	1.35

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
OMAN & EMIRATES INVESTMENT HOLDING CO	0.38	14.9%	10.9%	0.20	Sudatel Telecom	0.34	-5.3%	-2.9%	0.41
Abu Dhabi National for Building Materials	0.18	14.7%	-28.1%	0.02	Gulf Pharma Ind.	1.30	-3.7%	-29.3%	0.83
RAK Co. for White Cement & Construction	2.07	4.6%	21.8%	0.00	Manazel PJSC	0.42	-2.8%	-19.5%	8.28
Abu Dhabi Ship Building	3.59	3.76%	-10.3%	6.40	Easylease motorcycle rentals	37.12	-2.6%	28.0%	14.69
Eshraq Investments	0.64	3.7%	80.9%	33.19	Multiply Group	2.06	-1.9%	12.0%	99.43
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	Ras Al Khaimah Poultry	1.80	1.77	1.7%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Abu Dhabi National for Building Materials	0.16	0.15	2.0%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Driving	19.96	19.00	5.1%	0.00
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	7.05	6.70	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£)
Alexandria Mineral Oils Company	4.15	5.1%	13.4%	5.30	Ibnsina Pharma	1.69	-3.6%	-51.5%	6.95
Abu Dhabi Islamic Bank-Egypt	13.49	4.4%	-6.2%	1.57	Egyptian Kuwaiti Holding-EGP	23.36	-2.3%	18.9%	3.19
Telecom Egypt	15.01	3.9%	-10.5%	13.79	Egyptian Financial Group-Hermes	12.20	-1.6%	-1.1%	17.95
Housing & Development Bank	37.24	3.4%	-15.5%	2.05	MM Group For Industry And International Trade	3.12	-1.6%	-54.7%	32.42
Cleopatra Hospital Company	4.15	2.5%	-15.7%	9.31	Credit Agricole	6.04	-1.3%	-28.3%	0.62
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	2.55	2.67	-4.6%	18.92	Cleopatra Hospital Company	4.15	4.00	3.8%	9.31
Alexandria Mineral Oils Company	4.15	4.48	-7.4%	5.30	Eastern Company	10.40	9.53	9.1%	12.48
Tenth Of Ramadan Pharma Industries & Diagnostic	2.70	2.93	-7.8%	12.31	Oriental Weavers	7.00	6.30	11.1%	16.38
Misr Fertilizers Production Company - Mopco	104.94	114.00	-7.9%	4.13	Commercial International Bank	38.11	33.83	12.7%	70.96
Egyptian Kuwaiti Holding-EGP	23.36	25.50	-8.4%	3.19	Sidi Kerir Petrochemicals	7.41	6.33	17.1%	14.68

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ONGC	139.50	5.1%	-2.0%	5614.032	Divi's Laboratories	3721.10	-5.8%	-20.5%	7965.11
NTPC	159.00	3.5%	27.8%	2827.80	Apollo Hospitals Enterprise Ltd	4303.40	-2.9%	-14.4%	6089.73
Tata Steel	112.80	3.4%	-89.9%	10733.07	Infosys	1593.75	-1.6%	-15.6%	5695.42
UPL	789.00	2.8%	5.6%	2928.67	Maruti Suzuki India	8695.95	-1.3%	17.1%	6206.70
Power Grid Corp Of India	228.00	2.3%	11.5%	2259.66	Tata Consumer products Ltd.	763.70	-1.3%	2.7%	1726.34
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	1264.00	1280.00	-1.3%	4215.74	Hcl Technologies	956.00	877.35	9.0%	2894.46
Bajaj Auto	4038.00	4091.00	-1.3%	877.56	HDFC Life Insurance Company	543.80	497.05	9.4%	1583.97
Eicher Motors	3207.00	3265.95	-1.8%	4237.81	Divi's Laboratories	3721.10	3365.55	10.6%	7965.11
Coal India	221.45	226.80	-2.4%	1958.12	Wipro	436.50	391.00	11.6%	1549.26
SBI Life Insurance	1286.00	1317.25	-2.4%	2014.60	Kotak Mahindra Bank	1841.65	1631.00	12.9%	2574.35

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	98.75	2.9%	13.2%	0.60	NCBA Group Plc	26.20	-4.7%	4.0%	1.50
Centum Investment Company Plc	9.98	1.8%	-29.2%	0.28	Equity Group Holdings Plc	50.50	-2.4%	-4.3%	1.43
Diamond Trust Bank Limited	50.75	1.8%	-14.7%	0.85	Safaricom Plc	31.15	-2.0%	-17.9%	41.51
WPP Scangroup Plc	3.91	1.3%	-5.6%	0.05	Standard Chartered Bank Kenya Ltd	139.25	-0.5%	8.6%	2.52
Nation Media Group	20.00	1.3%	8.4%	0.84	Kengen Limited	3.79	-0.5%	-9.5%	3.08
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	139.25	148.75	-6.4%	2.52	Diamond Trust Bank Limited	50.75	48.00	5.7%	0.85
Bamburi Cement Limited	37.40	40.00	-6.5%	0.12	Kenya Reinsurance Corporation Ltd	2.09	1.92	8.9%	0.04
Absa Bank Kenya	12.00	12.95	-7.3%	1.74	British American Tobacco Kenya Ltd	445.00	400.00	11.3%	0.45
Equity Group Holdings Plc	50.50	55.00	-8.2%	1.43	Kengen Limited	3.79	3.35	13.1%	3.08
Stanbic Holdings	98.75	108.00	-8.6%	0.60	NCBA Group Plc	26.20	23.00	13.9%	1.50

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Medical Care Co.	62.80	7.4%	0.3%	70.46	Red Sea International Co.	35.25	-4.7%	66.9%	17.50
Al Moammar Information Systems Co.	106.80	5.3%	-29.5%	30.48	Mouwasat Medical Services Co.	242.00	-4.7%	39.2%	22.23
Buruj Cooperative Insurance Co.	21.80	5.3%	-1.4%	16.50	Rabigh Refining and Petrochemical Co.	17.98	-4.0%	-13.1%	677.97
National Gas and Industrialization Co.	45.90	4.7%	-15.3%	33.79	Arab Sea Information System	93.60	-3.8%	-52.2%	156.25
Saudi Public Transport Co.	17.90	4.6%	-11.1%	35.16	Yamama Cement	31.00	-3.3%	19.2%	5.90
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)
Scientific and Medical Equipment House Co.	73.70	73.70	0.0%	12.14	Alkhabeer REIT Fund	7.75	7.75	0.0%	5.40
Elm Co.	285.00	285.00	0.0%	21.63	Allied Cooperative Insurance Group	15.80	15.80	0.0%	3.71
Almunajem Foods Co.	69.40	69.40	0.0%	51.71	National Shipping Co of Saudi Arabia	27.65	27.65	0.0%	49.68
Saudi Tadawul Group Holding Co.	214.40	214.40	0.0%	28.96	Savola Group	34.35	34.35	0.0%	20.90
ACWA POWER Co.	172.20	172.20	0.0%	37.15	Alinma Retail REIT Fund	5.56	5.56	0.0%	7.84

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mondi PLC	33596.00	10.3%	-15.0%	56588.77	Sibanye Stillwater	4068.00	-6.1%	-17.1%	50553.97
SPAR Group Ltd/The	15313.00	4.1%	-8.4%	24839.20	Anglo American PLC	57920.00	-4.1%	-10.2%	95036.35
Aspen Pharmacare Holdings Ltd	15505.00	2.0%	-30.9%	11984.88	Impala Platinum Holdings Ltd	19386.00	-3.6%	-13.8%	29253.26
Mr Price Group Ltd	19653.00	1.7%	-1.5%	15635.02	MTN Group	15432.00	-2.9%	-9.6%	105051.40
Absa Group Ltd	18611.00	1.7%	22.0%	36599.74	Prosus NV	104814.00	-2.6%	-20.0%	55554.35
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)
Absa Group Ltd	18611.00	19536.00	-4.7%	36599.74	Vodacom Group Ltd	13687.00	12983.00	5.4%	16822.45
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Old Mutual Ltd	1176.00	1063.00	10.6%	12466.11
Investec PLC	9199.00	9684.15	-5.0%	5293.86	Woolworths Holdings Ltd	5433.00	4903.00	10.8%	14846.82
Investec Ltd	9103.00	9830.56	-7.4%	3166.88	Sibanye Stillwater	4068.00	3608.00	12.7%	50553.97
Clicks Group Ltd	30106.00	32943.00	-8.6%	13302.64	Clicks Group Ltd	30106.00	26700.00	12.8%	13302.64

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	58200.00	2.6%	3.9%	43655.82	Vietjet Aviation	124300.00	-0.7%	-3.1%	82075.29
Hoa Phat Group JSC	23950.00	2.4%	-31.8%	809445.34	Phu Nhuan Jewelry	113400.00	-0.6%	19.2%	56110.32
Vietnam Rubber Group JSC	23950.00	2.4%	-31.8%	809445.34	Khang Dien House Trading & Investment	38800.00	-0.5%	-16.3%	27730.36
Bank for Inv. and Devp	39200.00	2.3%	5.7%	64248.80	Vinhomes	61200.00	-0.3%	-23.2%	87112.08
Saigon Securities Inc	24900.00	2.0%	-45.9%	427747.14					
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.	182000.00	191000.00	-4.7%	19910.80	Vingroup JSC	66200.00	64000.00	3.4%	53701.44
No Va Land Invest	81500.00	91000.00	-10.4%	246513.05	Vinhomes	61200.00	57520.56	6.4%	87112.08
Petrovietnam Gas	114400.00	130442.43	-12.3%	41618.72	Vietjet Aviation	124300.00	116300.00	6.9%	82075.29
FPT Corp	86500.00	99083.29	-12.7%	107528.15	Phat Dat Real Estate Development Corp	53800.00	48200.00	11.6%	117031.14
Phu Nhuan Jewelry	113400.00	130421.95	-13.1%	56110.32	Asia Commercial JS Bank	24800.00	22000.00	12.7%	36208.00

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