

# Daily Market Report

## 16 August 2022

### JSE

JSE All-Share inched up by 0.01% to close at 70,740.63 points on Monday, as the Industrial and Financial sectors recorded gains.

### BRVM

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

### NSE

NSE All-Share Index slipped 0.07% to close at 49,629.43 points on Monday, as the Consumer Goods and Oil & Gas sectors recorded losses.

### EGX

EGX 30 Index declined by 0.70% to close at 9,914.71 points on Monday, as the market lost LE 2.6 billion of market cap, amid Arab and foreign selling.

### ESG

Casablanca ESG 10 Index increased by 0.20% to close at 912.00 points on Monday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 0.01%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	↔ 0.00%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.07%
<b>EGX</b> Egyptian Stock Exchange	▼ 0.70%
<b>ESG</b> Casablanca Stock Exchange	▲ 0.20%

### African Markets

**Nigeria:** NSE 30 Index was down marginally by 0.08% and closed at 1,773.83 points on Monday. Presco and Dangote Sugar were the top losers.

**Egypt:** EGX 30 Index declined by 0.70% to close at 9,914.71 points on Monday, as the market lost LE 2.6 billion of market cap, amid Arab and foreign selling.

**Kenya:** NSE 20 Index decreased by 0.29% and closed at 1,794.18 points on Monday. Centum Investment Company and British American Tobacco Kenya were the top losers.

**South Africa:** JSE Top 40 Index edged up by 0.04% to close at 64,021.60 points on Monday, as the Industrial and Financial sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 419.89
<b>INTERBANK RATES</b>	
OPR	14.00 ▲
Overnight	14.50 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.45% to close at 10,199.81 points on Monday, as losses in the Energy, Utilities and Telecommunications sectors pushed shares lower. MSCI UAE decreased by 0.34% to close at 465.20 points.

**Vietnam:** VN-30 Index rose 1.00% to close at 1,293.79 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased 0.52% to close at 821.74 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.23% to close at 12,543.77 points on Monday, as gains in the Media and Entertainment, Materials and Software & Services sectors led shares higher. MSCI Saudi Arabia increased by 0.48% to close at 1,750.89 points.

**India:** Nifty 50 Index was closed on Monday on account of Independence Day.

### News

#### Nigeria:

Rising Food, Commodity Prices Drive Inflation To 19.64%  
Delta unveils N459bn budget in 2023  
Fuel subsidy hits N1.593tn, refinery rehabilitation gulps N54.66bn

#### Kenya:

CBK seen taking expensive bids in August bond auction  
Kenya Eurobonds risk rating falls on investor confidence after polls  
Kakuzi strikes deal with US firm in diversification plans

#### Abu Dhabi:

Abu Dhabi rents at their most attractive since 2016  
UAE's Salama reports net profit of Dhs19.20m for H1 2022  
Emaar to discuss selling its e-commerce business

#### Saudi Arabia:

Saudi July CPI up 2.7% on food, increases from June  
Saudi Wholesale Price Index up by 6.8% in July  
Ma'aden reports \$1.65bn profits in H1-22 interim results

#### Egypt:

Foreign investments in local treasury bills increased by EGP 6.5bn in June 2022: CBE  
Unemployment rate in Egypt stabilizes at 7.2% during Q2 of 2022  
ODE achieves 16.9% growth in sales in 1H 2022

#### South Africa:

Absa profits up; doubles half-year dividend  
Discovery announces long-deferred medical aid increases  
Old Mutual approves new black empowerment share scheme

#### India:

BPCL to spend Rs 1.4 lakh crore on petchem, gas business  
SBI raises benchmark lending rates by up to 50 basis points  
Mahindra Unveils Five Electric SUVs to Fast Track EV Shift

#### Vietnam:

Central bank reduces intervention on OMO  
Hung Yen's industrial parks attract nearly 323 million USD  
Demand for logistics real estate increases sharply

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,199.81	-0.4%	-0.4%	5.6%	20.2%	AED/USD	3.67	0.0%	0.0%
Egypt	9,914.71	-0.7%	-0.7%	4.7%	-16.8%	EGP/USD	19.15	0.1%	21.9%
India	17,698.15	0.0%	0.0%	3.1%	2.0%	INR/USD	79.66	0.0%	7.2%
Kenya	1,794.18	-0.3%	-0.3%	5.5%	-5.7%	KES/USD	119.43	0.1%	5.6%
Nigeria	1,773.83	-0.1%	-0.1%	-2.6%	3.0%	NGN/USD	427.61	-0.1%	3.3%
Saudi Arabia	12,543.77	0.2%	0.1%	2.8%	10.7%	SAR/USD	3.76	0.0%	0.0%
South Africa	64,021.60	0.04%	0.04%	2.5%	-4.5%	ZAR/USD	16.44	1.7%	3.0%
Vietnam	1,293.79	1.0%	1.0%	5.0%	-15.8%	VND/USD	23,397.80	0.0%	2.7%

## MSCI Emerging Markets

MSCI Frontier	535.88	-0.1%	-0.1%	3.0%	-19.5%	Brent Crude (\$)	95.10	-3.1%	22.3%
MSCI Frontier 100	1,252.80	-0.1%	-0.1%	3.0%	-18.3%	Gold (\$)	1,798.10	-1.0%	-1.7%
MSCI Emerging	1,015.00	-0.2%	-0.2%	2.1%	-17.6%	Copper (\$)	7,980.00	-1.4%	-17.9%
MSCI World (USD)	2,842.48	0.3%	0.3%	3.5%	-12.0%	Coffee (\$)	201.65	0.3%	1.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.49	4.2%	17.1%	16.98	Presco	142.60	-10.0%	62.4%	75.12
Zenith	21.70	2.1%	-13.2%	180.53	Dangote Sugar	16.00	-4.2%	-3.0%	30.24
Transnational Corporation	1.08	0.9%	9.1%	13.71	Access	8.55	-2.8%	-6.0%	65.32
MTNN	201.00	0.5%	10.4%	134.12	FBNH	10.75	-2.3%	-6.5%	249.78
BUA Cement	53.20	0.5%	-20.7%	143.87	United Capital PLC	12.15	-2.0%	22.7%	15.74
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	3.50	3.50	0.0%	28.09	Cap	17.00	15.25	11.5%	0.12
UACN	10.80	10.80	0.0%	11.95	Guaranty	20.35	18.00	13.1%	315.92
Transcorp Hotels	6.25	6.25	0.0%	0.00	Stanbic IBTC	28.05	24.50	14.5%	15.83
Total	234.50	234.50	0.0%	22.62	Nascon	11.10	9.00	23.3%	0.70
Seplat Petroleum	1419.90	1419.90	0.0%	1.51	UBN	5.80	4.65	24.7%	10.59

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
HILY HOLDING PJSC	3.82	14.7%	15.8%	0.00	ARAM GROUP	2.70	-6.9%	-12.9%	0.01
Finance House	2.00	8.1%	0.0%	0.38	Adc Acquisition Corp PJSC Warrants	1.31	-6.4%	74.7%	0.16
National Marine Dredging	30.72	3.0%	135.6%	56.51	Abu Dhabi National Oil Co.	4.66	-4.5%	9.1%	72.40
Agthia Group	5.14	2.80%	-0.2%	5.04	Waha Capital	1.30	-3.7%	8.3%	0.66
PALMS SPORTS	10.60	1.9%	-13.3%	4.92	Manazel PJSC	0.41	-3.1%	-21.9%	7.22
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	Waha Capital	1.30	1.24	4.8%	0.65
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Driving Co.	19.94	19.00	4.9%	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 PJSC	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£)
MM Group For Industry And International Trade	3.27	4.8%	-52.5%	44.22	Housing & Development Bank	36.07	-3.1%	-18.1%	1.76
Egyptian Kuwaiti Holding	23.60	1.0%	20.1%	0.49	Ezz Steel	12.31	-3.0%	-17.9%	7.99
GB AUTO	3.21	0.9%	-37.1%	26.62	Tenth Of Ramadan Pharma Industries & Diagnostic	2.62	-3.0%	9.2%	1.28
Ibnsina Pharma	1.71	0.9%	-51.1%	19.58	Alexandria Mineral Oils	4.04	-2.7%	10.4%	11.53
Telecom Egypt	15.09	0.5%	-10.0%	12.38	Medinet Nasr Housing	2.49	-2.4%	9.6%	34.42
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	2.49	2.67	-6.9%	34.42	Cleopatra Hospital Company	4.09	4.00	2.3%	14.84
Egyptian Kuwaiti Holding-EGP	23.60	25.50	-7.5%	0.49	Eastern Company	10.34	9.53	8.5%	31.26
Misr Fertilizers Production Company - Mopco	104.00	114.00	-8.8%	2.72	Oriental Weavers	6.95	6.30	10.3%	6.30
Alexandria Mineral Oils	4.04	4.48	-9.8%	11.53	Commercial International Bank	37.99	33.83	12.3%	91.86
Tenth Of Ramadan Pharma Industries & Diagnostic	2.62	2.93	-10.6%	1.28	Ezz Steel	12.31	10.68	15.3%	7.99

## 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	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 Ins. Co	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

\*Market closed on 15/8

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	26.70	1.9%	6.0%	1.33	Centum Investment Company Plc	9.54	-4.4%	-32.3%	1.77
Equity Group Holdings Plc	51.25	1.5%	-2.8%	3.69	British American Tobacco Kenya Ltd	430.75	-3.2%	-2.4%	0.47
WPP Scangroup Plc	3.95	1.0%	-4.6%	0.05	The Cooperative Bank of Kenya Ltd	12.70	-0.8%	-1.9%	17.97
Kenya Reinsurance Corporation Ltd	2.11	1.0%	-8.3%	0.02	Kengen Limited	3.77	-0.5%	-10.0%	0.31
Absa Bank Kenya	12.10	0.8%	2.1%	0.50	East African Breweries Limited	157.00	-0.2%	-4.8%	10.14
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	139.75	148.75	-6.1%	0.42	Diamond Trust Bank Limited	51.00	48.00	6.3%	0.88
Bamburi Cement Limited	37.50	40.00	-6.3%	1.50	British American Tobacco Kenya Ltd	430.75	400.00	7.7%	0.47
Absa Bank Kenya	12.10	12.95	-6.6%	0.50	Kenya Reinsurance Corporation Ltd	2.11	1.92	9.9%	0.02
Equity Group Holdings Plc	51.25	55.00	-6.8%	3.69	Kengen Limited	3.77	3.35	12.5%	0.31
NCBA Group Plc	26.70	29.00	-7.9%	1.33	Kenya Power & Lighting Limited	1.50	1.30	15.4%	0.75

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Naqi Water Co.	86.90	25.9%	0.0%	844.84	Mouwasat Medical Services Co.	231.20	-4.5%	33.0%	37.11
Saudi Arabian Mining Co.	74.90	7.9%	90.1%	516.83	Halwani Bros. Co.	72.50	-4.2%	-20.2%	13.43
Saudi Arabian Mining Co.	74.90	7.9%	-4.6%	516.83	Saudi Enaya Coop Insurance Co.	20.98	-3.2%	-32.5%	10.79
SABIC Agri-Nutrients Co	165.00	6.2%	-6.6%	571.74	Tanmiah Food Co.	83.90	-3.1%	2.2%	19.99
Wafrah for Industry and Development Co.	42.30	5.1%	-70.8%	89.39	Eastern Province Cement Co.	45.40	-2.9%	3.3%	4.54
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.	185.40	185.40	0.0%	31.12	Alkhabeer REIT Fund	7.78	7.78	0.0%	3.57
Scientific and Medical Equipment House Co.	73.80	73.80	0.0%	10.67	Allied Cooperative Insurance Group	15.50	15.50	0.0%	4.60
Elm Co.	289.00	289.00	0.0%	45.27	National Shipping Co of Saudi Arabia	27.70	27.70	0.0%	42.25
Almunajem Foods Co.	69.20	69.20	0.0%	23.75	Savola Group	34.50	34.50	0.0%	17.13
Saudi Tadawul Group Holding Co.	216.00	216.00	0.0%	34.59	Alinma Retail REIT Fund	5.54	5.54	0.0%	4.82

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
British American Tobacco PLC	66851.00	2.1%	14.1%	67484.41	Impala Platinum Holdings Ltd	18752.00	-3.3%	-16.7%	31744.36
SPAR Group Ltd/The	15595.00	1.8%	-6.7%	20164.94	Northam Platinum	18072.00	-2.8%	-13.7%	9109.23
Naspers Ltd	247735.00	1.4%	0.2%	134192.85	MTN Group	15048.00	-2.5%	-11.9%	107163.90
MultiChoice Group	12380.00	1.3%	1.5%	6025.41	Anglo American Platinum Ltd	125082.00	-2.3%	-26.6%	31121.53
FirstRand Ltd	6955.00	1.3%	14.4%	70553.54	Old Mutual Ltd	1152.00	-2.0%	-12.1%	12767.46
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)
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Vodacom Group Ltd	13620.00	12983.00	4.9%	16424.06
Bidvest Group Ltd/The	22399.00	23636.00	-5.2%	19883.57	Old Mutual Ltd	1152.00	1063.00	8.4%	12767.46
Investec PLC	9158.00	9684.15	-5.4%	6810.72	Woolworths Holdings Ltd	5445.00	4903.00	11.1%	15966.77
Clicks Group Ltd	30250.00	32943.00	-8.2%	17661.19	Sibanye Stillwater	4045.00	3608.00	12.1%	38189.96
Investec Ltd	9020.00	9830.56	-8.2%	3842.22	Clicks Group Ltd	30250.00	26700.00	13.3%	17661.19

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Bank for Inv. and Devp	41000.00	4.6%	10.5%	154660.20	Saigon Securities Inc	24750.00	-0.6%	-46.2%	360746.10
Ho Chi Minh City Devp	26300.00	3.5%	-14.7%	126847.53	Vinamilk	71500.00	-0.6%	-13.0%	180594.70
Mobile World Inv. Corp	65000.00	3.2%	-3.7%	288184.00	BaoViet Holdings	57900.00	-0.5%	3.4%	44403.51
Vietnam JSC Bank	29450.00	2.8%	-13.1%	183332.14	Petrovietnam Gas	114000.00	-0.3%	21.7%	46090.20
FPT Corp	88900.00	2.8%	14.7%	274256.50					
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.	186000.00	191000.00	-2.6%	45179.40	Vingroup JSC	66400.00	64000.00	3.8%	53259.44
No Va Land Invest	81800.00	91000.00	-10.1%	210970.38	Vinhomes	61500.00	57520.56	6.9%	134654.25
FPT Corp	88900.00	99083.29	-10.3%	274256.50	Vietjet Aviation	124400.00	116300.00	7.0%	83124.08
Phu Nhuan Jewelry	114700.00	130421.95	-12.1%	78340.10	Phat Dat Real Estate Development Corp	54200.00	48200.00	12.4%	140383.42
Petrovietnam Gas	114000.00	130442.43	-12.6%	46090.20	Asia Commercial JS Bank	24950.00	22000.00	13.4%	78707.27

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