

Daily Market Report

23 August 2022

JSE

JSE All-Share declined by 0.75% to closed at 69,195.63 points on Monday, as Industrial sector recorded losses.

BRVM

BRVM Composite Index closed at 206.63 points, down by 0.14% on Monday, with SMB Côte d'Ivoire and Solibra Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index slipped by 0.05% to close at 49,344.67 points on Monday, as the Oil & Gas, Insurance and Banking sectors recorded losses.

EGX

EGX 30 Index declined by 0.90% and closed at 10,246.24 points on Monday, as the market lost LE 3.38 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.41% to close at 905.76 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.75%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.14%
NGX Nigerian Stock Exchange	▼ 0.05%
EGX Egyptian Stock Exchange	▼ 0.90%
ESG Casablanca Stock Exchange	▼ 0.41%

African Markets

Nigeria: NGX 30 Index decreased marginally by 0.08% and closed at 1,762.43 points on Monday. Ecobank and UBA were the top losers.

Egypt: EGX 30 Index declined by 0.90% and closed at 10,246.24 points on Monday, as the market lost LE 3.38 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index decreased by 0.49% and closed at 1,770.46 points on Monday. Safaricom and Nation Media Group were the top losers.

South Africa: JSE Top 40 Index declined by 0.78% to closed at 62,482.18 points on Monday, as Industrial sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 421.71
INTERBANK RATES	
OPR	14.50 ▼
Overnight	15.00 ↔

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.42% and close at 10,040.58 points on Monday, as losses in the Energy, Telecommunications and Industrial sectors pushed shares lower. MSCI UAE decreased by 0.65% to close at 453.44 points.

Vietnam: VN-30 Index decreased by 0.73% to close at 1285.45 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.33% to close at 814.03 points.

Saudi Arabia: Tadawul All Share Index inched up by 0.05% to close at 12,560.48 points on Monday, as gains in the Utilities, Software & Services and Bank sectors led shares higher. MSCI Saudi Arabia inched up by 0.08% to close at 1,749.68 points.

India: Nifty 50 Index dropped by 1.51% to close at 17,490.70 points on Monday, as losses in the Financial Services, Auto and Bank sectors pushed shares lower. MSCI India dropped by 1.58% to close at 2,046.95 points.

News

Nigeria:

NNPCL Records \$1.21bn Deficit in Priority Projects' Funding in Six Months
NNPC eyes N422bn from six IOCs in Aug
Aggregate FX Inflow Down 17.3% to \$6.58bn on Low Non-oil Components

Kenya:

Eurobonds, NSE fall after Raila Odinga's SC test of poll results
Kenya's Diaspora Remittances Fall 0.7% to \$319.4 Million in July
Tea volumes offered for sale down, price up marginally

Abu Dhabi:

UAE's non-oil trade jumps 17% to \$287bn in first half of 2022
UAE more than doubles investments in Egypt to \$1.9bn in six months
ADX tops region in buy, sell deals by foreigners: AMF

Saudi Arabia:

Saudi banks outperform with assets growing by 10% to \$880bn
Aramco-Total JV SATORP swings to \$1.2bn profit on strong first-half sales
MBC-backed Al Arabia's profit jumps 63% on stronger client base

Egypt:

ADIB-Egypt, SimpliFi partner to expand digital payments ecosystem in Egypt
Egypt's exports to Bahrain, Jordan, Iraq increase during the 1H22
Telecom, Orange Jordan sign agreement to boost Iraq's internet connectivity

South Africa:

Shoprite secures R3.5bn in loans for green projects
Prosus emerges victorious as it finally buys remaining iFood stake for R31bn
MTN confirms talks are ongoing for Telkom takeover

India:

Auto parts companies' turnover hits 5-yr high of Rs 4.2 lakh crore
Creditors file Rs 21,000cr claim against Future
Rs 70,000 crore pulled out from debt MFs in June quarter

Vietnam:

Petroleum imports rise 50% in 2022
MoU for PP mega project in Vietnam / USD 1.5 bn investment
\$200 million channeled into Việt Nam-Singapore III in Bình Dương

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,040.58	-0.4%	-0.4%	3.9%	18.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,246.24	-0.9%	1.5%	8.2%	-14.0%	EGP/USD	19.15	0.0%	21.9%
India	17,490.70	-1.5%	-1.5%	1.9%	0.8%	INR/USD	79.87	0.1%	7.4%
Kenya	1,770.46	-0.5%	-0.5%	4.1%	-6.9%	KES/USD	119.80	0.1%	5.9%
Nigeria	1,762.43	-0.1%	-0.1%	-3.2%	2.3%	NGN/USD	426.25	-0.4%	3.0%
Saudi Arabia	12,560.48	0.05%	-0.5%	3.0%	10.8%	SAR/USD	3.76	0.0%	0.0%
South Africa	62,482.18	-0.8%	-0.8%	0.01%	-6.8%	ZAR/USD	17.00	0.0%	6.5%
Vietnam	1,285.45	-0.7%	-0.7%	4.3%	-16.3%	VND/USD	23,412.30	0.1%	2.7%

MSCI Emerging Markets

MSCI Frontier	529.68	-1.0%	-1.0%	1.8%	-20.4%	Brent Crude (\$)	96.48	-0.2%	24.0%
MSCI Frontier 100	1,237.83	-1.0%	-1.0%	1.8%	-19.3%	Gold (\$)	1,748.40	-0.8%	-4.4%
MSCI Emerging	991.90	-1.0%	-1.0%	-0.2%	-19.5%	Copper (\$)	8,027.00	-0.6%	-17.4%
MSCI World (USD)	2,736.10	-1.9%	-1.9%	-0.4%	-15.3%	Coffee (\$)	199.66	2.5%	0.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	12.00	1.7%	21.2%	10.73	Ecobank	10.00	-5.7%	19.8%	20.53
Fidelity	3.07	0.3%	20.4%	4.91	Transnational Corporation	1.05	-1.9%	6.1%	9.72
Zenith	22.00	0.2%	-12.0%	140.83	UBA	7.05	-0.7%	-11.9%	20.29
Lafarge Africa	24.00	0.2%	1.3%	29.02	Sterling	1.51	-0.7%	0.7%	11.91
					Guaranty	20.25	-0.2%	-22.1%	173.74
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%	15.88	Cap	17.00	15.25	11.5%	0.07
UACN	10.80	10.80	0.0%	6.21	Guaranty	20.25	18.00	12.5%	173.74
Transcorp Hotels	6.25	6.25	0.0%	0.12	Stanbic IBTC	28.00	24.50	14.3%	7.72
Total	234.50	234.50	0.0%	1.20	Nascon	11.00	9.00	22.2%	0.84
Seplat Petroleum	1419.90	1419.90	0.0%	100.87	Unilever	13.50	10.50	28.6%	1.04

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ooredoo	7.76	15.0%	19.4%	0.51	National Marine Dredging	28.96	-6.9%	122.1%	39.26
Abu Dhabi National for Building Materials	0.18	9.3%	-28.9%	0.00	Al Ain Ahlia Ins.	43.00	-4.4%	28.1%	0.04
Q HOLDING PSC	3.70	4.2%	-16.1%	78.22	Adc Acquisition Corp Pjsc Warrants	1.32	-3.7%	76.0%	0.07
Adc Acquisition Corporation Pjsc Shares	11.90	3.12%	8.8%	0.69	National Corp for Tourism and Hotels	2.09	-2.8%	-30.3%	0.06
Gulf Cement	0.52	3.0%	-25.9%	0.01	Abu Dhabi Commercial Bank	9.21	-2.5%	8.0%	21.04
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Al Buhaira Ntl Ins.	2.30	2.30	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Dana Gas PJSC	0.97	0.92	5.2%	16.80
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Sawaeed Holding	7.05	6.70	5.2%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Emirates Driving	20.00	19.00	5.3%	0.08
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Waha Capital	1.31	1.24	5.6%	0.51

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Medinet Nasr Housing	2.99	13.3%	31.6%	163.48	Credit Agricole Egypt	6.39	-3.3%	-24.1%	7.98
Palm Hills Development Co	1.39	3.7%	-30.3%	28.51	Tenth Of Ramadan Pharma Industries & Diagnostics	2.74	-2.5%	14.2%	4.00
Heliopolis Housing	6.20	2.6%	-7.6%	42.66	Ibnsina Pharma	1.95	-2.4%	-44.0%	26.29
Juhayna Food Industries	7.36	2.1%	-3.8%	0.38	Fawry For Banking Tech And E-Payment	3.82	-2.3%	-44.9%	73.31
T M G Holding	7.97	1.5%	-12.1%	33.12	Commercial International Bank	39.90	-2.1%	-24.7%	155.78
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	2.99	2.99	0.0%	163.48	Cleopatra Hospital Company	4.03	4.00	0.8%	25.53
Misr Fertilizers Production Company - Mopco	107.98	114.00	-5.3%	18.42	Eastern Company	10.55	9.53	10.7%	6.76
Tenth Of Ramadan Pharma Industries & Diagnostic	2.74	2.93	-6.5%	4.00	Oriental Weavers	7.24	6.30	14.9%	6.57
Egyptian Kuwaiti Holding-Egp	23.74	25.50	-6.9%	29.36	Housing & Development Bank	35.89	31.01	15.7%	2.65
Alexandria Mineral Oils Company	4.09	4.48	-8.7%	7.12	Commercial International Bank	39.90	33.83	17.9%	155.78

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Consumer products Ltd.	793.50	0.8%	6.7%	1715.265	Tata Steel	105.20	-4.4%	-90.5%	7906.47
Coal India	218.55	0.6%	49.6%	2264.61	Tata Motors	453.55	-3.7%	-6.0%	6929.92
ITC	313.85	0.6%	43.9%	3577.88	Adani Ports And Sez.	840.00	-3.7%	15.0%	12721.24
Britannia Inds.	3675.00	0.3%	1.9%	1353.93	Asian Paints	3356.15	-3.6%	-0.8%	7902.39
Nestle India Limited	19480.00	0.2%	-1.1%	775.84	Divi's Laboratories Limited	3578.20	-3.2%	-23.5%	3767.39
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	4048.40	4120.45	-1.7%	1567.85	Divi's Laboratories	3578.20	3365.55	6.3%	3767.39
Eicher Motors	3361.35	3460.00	-2.9%	3122.26	Wipro	420.20	391.00	7.5%	2732.15
Coal India	218.55	226.80	-3.6%	2264.61	Hcl Technologies	961.00	877.35	9.5%	3483.27
Icici Bank	854.00	887.65	-3.8%	11838.67	Kotak Mahindra Bank	1836.00	1631.00	12.6%	7605.52
SBI Life Insurance	1277.00	1334.70	-4.3%	1246.64	Bharat Petroleum	333.00	293.35	13.5%	705.46

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Equity Group Holdings Plc	49.00	2.1%	-7.1%	8.84	Safaricom Plc	30.10	-3.7%	-20.7%	100.07
NCBA Group Plc	26.15	1.4%	3.8%	0.75	Nation Media Group	18.35	-3.7%	-0.5%	3.98
Centum Investment Company Plc	9.92	0.8%	-29.6%	0.03	Standard Chartered Bank Kenya Ltd	135.75	-1.8%	5.8%	7.07
KCB Group Plc	43.50	0.6%	-4.3%	8.44	WPP Scangroup Plc	3.65	-1.4%	-11.8%	0.19
Diamond Trust Bank Limited	50.50	0.5%	-15.1%	0.01	Absa Bank Kenya	12.20	-1.2%	3.0%	0.93
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	38.15	40.00	-4.6%	0.38	Diamond Trust Bank Limited	50.50	48.00	5.2%	0.01
Absa Bank Kenya	12.20	12.95	-5.8%	0.93	British American Tobacco Kenya Ltd	439.25	400.00	9.8%	0.66
Stanbic Holdings	99.00	108.00	-8.3%	0.12	Kenya Power & Lighting Limited	1.45	1.30	11.5%	1.22
Standard Chartered Bank Kenya Ltd	135.75	148.75	-8.7%	7.07	Kengen Limited	3.74	3.35	11.6%	0.25
NCBA Group Plc	26.15	29.00	-9.8%	0.75	Standard Chartered Bank Kenya Ltd	135.75	121.00	12.2%	7.07

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudia Dairy and Foodstuff Co.	196.00	10.0%	18.8%	74.09	Buruj Cooperative Insurance Co.	19.14	-7.1%	-13.4%	11.05
Astra Industrial Group	51.60	6.3%	29.6%	82.04	Salama Cooperative Insurance Co.	28.70	-5.6%	68.8%	19.75
Bupa Arabia for Cooperative Insurance Co.	167.00	5.4%	27.1%	46.19	Saudi Ground Services Co.	30.10	-4.8%	1.9%	33.73
Saudi Printing and Packaging Co.	20.12	5.3%	-8.4%	16.91	Tihama Advertising and Public Relations	105.40	-4.5%	179.2%	14.25
National Gas and Industrialization Co.	48.25	4.0%	-11.0%	27.85	United Cooperative Assurance Co.	10.90	-3.7%	-67.9%	22.93
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.	199.60	199.60	0.0%	95.22	Alkhabeer REIT Fund	7.73	7.73	0.0%	1.56
Scientific and Medical Equipment House Co.	75.00	75.00	0.0%	26.74	Allied Cooperative Insurance Group	15.50	15.50	0.0%	1.74
Elm Co.	330.00	330.00	0.0%	123.40	Gulf General Coop Insurance Co.	8.96	8.96	0.0%	8.23
Almunajem Foods Co.	70.70	70.70	0.0%	96.49	National Shipping Co of Saudi Arabia	29.15	29.15	0.0%	67.86
Saudi Tadawul Group Holding Co.	228.00	228.00	0.0%	111.68	Saudi Company for Hardware	35.90	35.90	0.0%	13.14

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Exxaro Resources Ltd	22222.00	4.0%	45.4%	17924.75	Cie Financiere Richemont SA	19300.00	-3.0%	-20.0%	71942.97
SPAR Group Ltd/The	15752.00	2.7%	-5.7%	20753.34	Mondi PLC	30653.00	-2.7%	-22.4%	30654.01
Clicks Group Ltd	30620.00	1.5%	-3.0%	26386.45	Standard Bank Group Ltd	16086.00	-2.2%	14.9%	53878.98
Sanlam Ltd	5760.00	1.2%	-3.0%	27677.61	Impala Platinum Holdings Ltd	17460.00	-1.7%	-22.4%	28303.93
Old Mutual Ltd	1141.00	1.2%	-12.9%	15865.85	Prosus NV	106223.00	-1.6%	-18.9%	81934.26
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)
Shoprite Holdings Ltd	23600.00	24723.00	-4.5%	33563.59	Vodacom Group Ltd	13385.00	12983.00	3.1%	13242.69
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Anglo American Platinum Ltd	116049.00	109317.55	6.2%	23461.05
Absa Group Ltd	18447.00	19536.00	-5.6%	73886.40	Sibanye Stillwater	3854.00	3608.00	6.8%	32513.91
Clicks Group Ltd	30620.00	32943.00	-7.1%	26386.45	Old Mutual Ltd	1141.00	1063.00	7.3%	15865.85
Glencore PLC	9812.00	10594.00	-7.4%	17460.88	Woolworths Holdings Ltd	5300.00	4903.00	8.1%	15473.64

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Mobile World Inv. Corp	66500.00	3.7%	-1.5%	389397.40	Ho Chi Minh City Devp	25450.00	-3.0%	-17.5%	70030.77
BaoViet Holdings	57000.00	2.2%	1.8%	51254.40	Vingroup JSC	66000.00	-2.8%	-30.6%	96960.60
Phu Nhuan Jewelry	114800.00	0.7%	20.6%	46999.12	Phat Dat Real Estate Development Corp	56100.00	-2.6%	-19.7%	159739.14
Military Commercial Bank	23100.00	0.4%	-4.1%	245675.43	Khang Dien House Trading & Investment	37700.00	-2.6%	-18.7%	35683.05
PetroVietnam Power Corp	13650.00	0.4%	-22.0%	113816.43	Bank for Inv. and Devp	38450.00	-2.3%	3.6%	67741.21
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.	194000.00	197900.00	-2.0%	17033.20	Vingroup JSC	66000.00	64000.00	3.1%	96960.60
No Va Land Invest	81800.00	91000.00	-10.1%	258422.56	Vinhomes	59400.00	57520.56	3.3%	125743.86
Petrovietnam Gas	114900.00	130442.43	-11.9%	42535.98	Vietjet Aviation	123900.00	116800.00	6.1%	32102.49
Phu Nhuan Jewelry	114800.00	130421.95	-12.0%	46999.12	Khang Dien House Trading & Investment	37700.00	33909.09	11.2%	35683.05
FPT Corp	86800.00	99083.29	-12.4%	141831.20	Asia Commercial JS Bank	24650.00	22000.00	12.0%	55198.75

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