

# Daily Market Report

## 25 August 2022

### JSE

JSE All-Share inched up by 0.05% and closed at 69,809.69 points on Thursday, as Industrial sector recorded gains.

### BRVM

BRVM Composite Index remained unchanged at 206.47 points on Thursday, with Total Senegal and Sucrivoire Côte d'Ivoire being the top gainers.

### NSE

NGX All-Share Index increased by 0.25% to close at 48,675.24 points on Thursday, as the Insurance, Banking and Industrial sectors recorded gains.

### EGX

EGX 30 Index decreased by 0.32% and closed at 10,105.24 points on Wednesday, as the market lost LE 2.6 billion of market cap, amid foreign selling.

### ESG

Casablanca ESG 10 Index increased by 0.52% to close at 913.11 points on Thursday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 0.05%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	↔ 0.00%
<b>NGX</b> Nigerian Stock Exchange	▲ 0.25%
<b>EGX</b> Egyptian Stock Exchange	▼ 0.32%
<b>ESG</b> Casablanca Stock Exchange	▲ 0.52%

### African Markets

**Nigeria:** NGX 30 Index increased by 0.29% and closed at 1,742.55 points on Wednesday. Stanbic IBTC and Ecobank were the top gainers.

**Egypt:** EGX 30 Index decreased by 0.32% and closed at 10,105.24 points on Wednesday, as the market lost LE 2.6 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index increased by 0.29% and closed at 1,758.76 points on Wednesday. Nairobi Securities Exchange and British American Tobacco Kenya were the top gainers.

**South Africa:** JSE Top 40 Index inched up by 0.07% and closed at 63,079.74 points on Thursday, as Industrial sector recorded gains.

### Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 422.39
<b>INTERBANK RATES</b>	
OPR	15.00 ▲
Overnight	15.00 ↔

### Other Emerging Markets

**Abu Dhabi:** ADX Index was down by 0.17% and close at 10,002.05 points on Thursday, as losses in the Industrial, Telecommunications and Healthcare sectors pushed shares lower. MSCI UAE was down by 0.16% to close at 450.40 points.

**Vietnam:** VN-30 Index increased by 0.34% to close at 1296.41 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.40% to close at 822.89 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.19% to close at 12,443.77 points on Thursday, as gains in the Energy, Utilities and Bank sectors pushed shares higher. MSCI Saudi Arabia increased by 0.28% to close at 1,733.89 points.

**India:** Nifty 50 Index was up by 0.16% to close at 17,604.95 points on Thursday, as gains in the Media, financial services and Bank sectors pushed shares higher. MSCI India was up by 0.17% to close at 2,060.31 points.

### News

#### Nigeria:

Forex inflows drop 17% to \$6.6bn  
July Allocation Rises by N151.6bn as FAAC Shares N954bn to FG, States, LGs  
Nigerian Breweries Registers N100bn Commercial Paper On FMDQ Exchange

#### Kenya:

KCB Group half year net profit up 27pc to Sh19.6 billion  
Kenya Airways first-half loss narrows to Sh9.8bn, eyes profit in 2024  
Bank loan defaults cross half a trillion for the first time

#### Abu Dhabi:

UAE health firm Burjeel plans Saudi expansion as IPO nears  
Abu Dhabi airports' passenger traffic hits 6.3 million in 1H22  
Assets of national companies listed on ADX, DFM show 10% rise in 1H22

#### Saudi Arabia:

Oil rises on US response to Iran nuclear deal comments  
Saudi Arabia's non-oil exports surge by 31% in Q2 to \$23bn  
Saudi Arabia's NDMC closes August issuance of sukuk program at \$824m

#### Egypt:

4 int'l companies compete for petrochemical complex project in SCZone  
Egypt's TSFE attracts \$3.3 bn investments from Arab sovereign funds in 2022  
Emirati, Australian companies consider investing in Egyptian green energy

#### South Africa:

Inflation at 13-year high as fuel and food prices rise above expectations  
Bidcorp revenue up, increases dividend 75%  
NEPI Rockcastle reports steady interim distributable earnings growth

#### India:

RBI allows American Express to add new customers after 16-month ban  
States' revenue growth to slide to 7-9% despite robust GST collections  
Govt mulls selling at least 51% stake in IDBI Bank

#### Vietnam:

Việt Nam, Japan agree on enhanced cooperation to improve supply chains  
Mobile World plans stake sale of \$1.5 billion Vietnamese grocery unit  
Public spending meets 39% of year's target

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,002.05	-0.2%	-0.8%	3.5%	17.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,105.24	-0.3%	0.1%	6.7%	-15.2%	EGP/USD	19.17	0.1%	22.0%
India	17,604.95	0.2%	-0.9%	2.6%	1.4%	INR/USD	79.82	-0.1%	7.4%
Kenya	1,758.76	0.3%	-1.1%	3.4%	-7.6%	KES/USD	119.89	0.0%	6.0%
Nigeria	1,742.55	0.3%	-1.2%	-4.3%	1.2%	NGN/USD	427.52	0.1%	3.3%
Saudi Arabia	12,443.77	0.2%	-1.4%	2.0%	9.8%	SAR/USD	3.76	0.1%	0.1%
South Africa	63,079.74	0.1%	0.2%	1.0%	-5.9%	ZAR/USD	17.00	0.0%	6.5%
Vietnam	1,296.41	0.3%	0.1%	5.2%	-15.6%	VND/USD	23,445.00	0.1%	2.9%

## MSCI Emerging Markets

MSCI Frontier	532.61	0.2%	-0.5%	2.4%	-20.0%	Brent Crude (\$)	101.22	1.0%	30.1%
MSCI Frontier 100	1,243.48	0.0%	-0.5%	2.2%	-18.9%	Gold (\$)	1,761.50	0.02%	-3.7%
MSCI Emerging	985.13	-0.4%	-1.6%	-0.9%	-20.0%	Copper (\$)	8,034.50	-1.1%	-17.3%
MSCI World (USD)	2,736.01	0.2%	-1.9%	-0.4%	-15.3%	Coffee (\$)	206.22	2.1%	3.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Stanbic IBTC	30.50	8.9%	-15.3%	86.70	FCMB	3.13	-2.2%	5.0%	1.90
Ecobank	10.80	8.0%	29.3%	2.24	Access	8.20	-1.2%	-9.9%	231.14
Sterling	1.52	1.3%	1.3%	1.96	UBA	7.00	-0.7%	-12.5%	160.91
BUA Cement	52.00	1.3%	-22.4%	9.34	Guaranty	20.10	-0.5%	-22.7%	323.99
Transnational Corporation	1.04	1.0%	5.1%	2.23	United Capital PLC	11.90	-0.4%	20.2%	9.31
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%	1.49	Cap	16.50	15.25	8.2%	1.17
UACN	10.80	10.80	0.0%	1.55	Guaranty	20.10	18.00	11.7%	323.99
Transcorp Hotels	6.25	6.25	0.0%	0.0	Nascon	11.00	9.00	22.2%	0.23
Total	234.50	234.50	0.0%	1.93	Stanbic IBTC	30.50	24.50	24.5%	86.70
Seplat Petroleum	1300.00	1300.00	0.0%	168.88	Unilever	13.50	10.50	28.6%	0.27

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sharjah Cement	0.66	7.9%	-14.2%	0.00	ARAM GROUP	2.43	-10.0%	-21.6%	0.02
Abu Dhabi Ship Building	3.69	5.4%	-7.8%	2.84	Al Seer Marine Supplies & Equipment Co	9.20	-2.1%	-33.8%	18.15
RAK Properties PJSC	0.78	5.0%	1.3%	10.95	National Corp for Tourism & Hotels	2.05	-1.9%	-31.7%	0.06
Q HOLDING PSC	3.75	3.59%	-15.0%	38.70	ADC Acquisition Corporation PJSC	12.00	-1.6%	9.7%	1.48
Manazel PJSC	0.43	3.4%	-18.5%	5.49	Shares	25.84	-1.5%	-18.5%	63.12
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	Dana Gas PJSC	0.97	0.96	0.7%	3.16
Insurance House	0.85	0.85	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	1.68
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Driving	19.90	19.00	4.7%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	National Corp for Tourism & Hotels	2.05	1.95	5.0%	0.06
Fujairah Building Industries	2.18	2.18	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Tenth Of Ramadan Pharml Industries & Diagnostic	2.80	2.9%	16.7%	13.29	Palm Hills Dev Co	1.33	-2.1%	-33.3%	11.53
Housing & Development Bank	36.70	1.8%	-16.7%	2.07	Heliopolis Housing	5.94	-2.0%	-11.5%	18.78
Alexandria Containers and goods	9.79	1.5%	16.5%	2.00	Sidi Kerir Petrochem	7.44	-1.8%	-4.6%	11.09
Gb Auto	3.28	1.2%	-35.7%	31.54	Cairo For Inv and Real Estate Development	11.07	-1.7%	-18.7%	3.18
Medinet Nasr Housing	2.94	1.0%	29.4%	106.01	Fawry For Banking Tech & E-Payment	3.63	-1.6%	-47.7%	48.45
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£)
Tenth Of Ramadan Pharm Industries & Diagnostic	2.80	2.93	-4.4%	13.29	Cleopatra Hospital Company	4.12	4.00	3.0%	26.46
Medinet Nasr Housing	2.94	3.08	-4.5%	106.01	Eastern Company	10.47	9.53	9.9%	22.47
Misr Fertilizers Production Company - Mopco	105.86	114.00	-7.1%	2.09	Oriental Weavers	7.17	6.30	13.8%	5.64
Egyptian Kuwaiti Holding	23.24	25.50	-8.9%	18.50	Orascom Construction PLC	58.01	50.00	16.0%	2.66
Alexandria Mineral Oils Company	3.99	4.48	-10.9%	6.59	Cairo For Inv and Real Estate Devpt	11.07	9.51	16.4%	3.18

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Apollo Hospitals Enterprise Ltd	4200.00	3.2%	-16.4%	3984.226	Bharat Petroleum	329.55	-1.2%	-14.5%	856.59
Indusind Bank	1102.00	2.9%	24.1%	4022.60	Tata Steel	106.30	-1.2%	-90.4%	5941.18
ONGC	136.00	1.7%	-4.5%	3097.65	Divi's Laboratories Limited	3496.00	-1.0%	-25.3%	6482.88
Icici Bank	873.05	1.1%	18.0%	9109.52	Tata Consultancy Svs.	3254.10	-0.9%	-13.0%	5518.73
NTPC	160.30	1.0%	28.9%	3323.44	Titan Company	2458.00	-0.9%	-2.6%	1654.84
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	4069.05	4120.45	-1.2%	997.80	Divi's Laboratories Limited	3496.00	3365.55	3.9%	6482.88
Coal India	223.50	226.80	-1.5%	2424.15	Wipro	416.30	391.00	6.5%	1546.38
Icici Bank	873.05	887.65	-1.6%	9109.52	Hcl Technologies	949.20	877.35	8.2%	1417.86
ITC	313.90	319.45	-1.7%	3587.09	Tata Consultancy Svs.	3254.10	2953.00	10.2%	5518.73
Mahindra & Mahindra	1267.45	1298.70	-2.4%	3263.94	Bharat Petroleum	329.55	293.35	12.3%	856.59

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange	7.98	5.8%	6.1%	0.20	Absa Bank Kenya	11.60	-3.3%	-2.1%	2.63
British American Tobacco Kenya Ltd	460.00	4.5%	4.2%	0.09	Safaricom Plc	29.10	-2.3%	-23.3%	103.60
Centum Investment Company Plc	9.84	3.1%	-30.2%	0.01	Kenya Power & Lighting Limited	1.42	-2.1%	-18.9%	0.24
Diamond Trust Bank Limited	51.25	2.0%	-13.9%	0.30	Kenya Reinsurance Corporation Ltd	2.12	-1.9%	-7.8%	0.54
NCBA Group Plc	26.45	1.9%	5.0%	0.15	Total Kenya Ltd	24.20	-1.0%	-3.2%	0.06
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	38.35	40.00	-4.1%	0.07	Diamond Trust Bank Limited	51.25	48.00	6.8%	0.30
Total Kenya Ltd	24.20	26.30	-8.0%	0.06	Kenya Power & Lighting Limited	1.42	1.30	9.2%	0.24
Standard Chartered Bank Kenya Ltd	136.75	148.75	-8.1%	1.18	Kengen Limited	3.69	3.35	10.1%	4.23
Stanbic Holdings	99.25	108.00	-8.1%	0.91	Kenya Reinsurance Corporation Ltd	2.12	1.92	10.4%	0.54
NCBA Group Plc	26.45	29.00	-8.8%	0.15	Standard Chartered Bank Kenya Ltd	136.75	121.00	13.0%	1.18

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Hammadi Company for Development and Investment	45.00	9.8%	11.7%	71.87	Dar Alarkan Real Estate Development	13.32	-6.9%	32.4%	361.52
Malath Cooperative Insurance Co.	15.16	5.0%	-33.4%	11.60	Salama Cooperative Insurance Co.	24.12	-6.7%	41.9%	65.58
Saudia Dairy and Foodstuff	199.00	4.2%	20.6%	34.60	BinDawood Holding	84.80	-3.6%	-11.5%	13.81
Amana Cooperative Insurance Co.	12.70	3.6%	-63.1%	20.73	Mulkia Gulf Real Estate REIT	8.90	-3.6%	-9.6%	3.61
SABIC Agri-Nutrients Co	164.80	3.5%	-6.7%	354.63	Abdulmohsen Alhokair Group for Tourism and Development	12.30	-3.5%	-28.8%	9.67
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.	199.40	199.40	0.0%	89.38	Alkhabeer REIT Fund	7.70	7.70	0.0%	2.17
Scientific and Medical Equipment House Co.	70.60	70.60	0.0%	39.58	Allied Cooperative Insurance Group	15.20	15.20	0.0%	0.70
Elm Co.	327.00	327.00	0.0%	90.53	Gulf General Coop Insurance Co.	8.44	8.44	0.0%	9.51
Almunajem Foods Co.	70.60	70.60	0.0%	31.92	National Shipping Co of Saudi Arabia	28.00	28.00	0.0%	42.06
Saudi Tadawul Group Holding Co.	220.60	220.60	0.0%	92.95	Saudi Company for Hardware	35.60	35.60	0.0%	7.74

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Ltd	34984.00	3.4%	35.1%	80217.86	Aspen Pharmacare Holdings Ltd	14091.00	-3.3%	-37.2%	13225.77
Bid Corp Ltd	33849.00	3.1%	3.7%	34839.02	Mondi PLC	29733.00	-2.6%	-24.8%	26106.47
Anglo American Platinum Ltd	123359.00	3.0%	-27.7%	26790.74	Anglo American PLC	57752.00	-1.9%	-10.5%	48037.54
Cie Financiere Richemont SA	19975.00	2.9%	-17.2%	68633.30	NEPI Rockcastle PLC	9293.00	-1.6%	-12.3%	15219.33
Northam Platinum Ltd	17349.00	2.0%	-17.2%	7425.01	Standard Bank Group Ltd	15749.00	-1.5%	12.5%	41708.44
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)
Bidvest Group Ltd/The	22560.00	23636.00	-4.6%	16094.46	Vodacom Group Ltd	13161.00	12983.00	1.4%	12603.36
British American Tobacco PLC	69283.00	73123.00	-5.3%	21357.39	Woolworths Holdings Ltd	5234.00	4903.00	6.8%	8294.48
Glencore PLC	10008.00	10594.00	-5.5%	47103.47	Growthpoint Properties Ltd	1308.00	1207.00	8.4%	5870.82
Absa Group Ltd	18399.00	19536.00	-5.8%	38191.89	Old Mutual Ltd	1155.00	1063.00	8.7%	12284.72
Bid Corp Ltd	33849.00	36098.00	-6.2%	34839.02	Aspen Pharmacare Holdings Ltd	14091.00	12889.00	9.3%	13225.77

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vinamilk	77700.00	2.5%	-5.4%	422967.72	Saigon Beer Alcohol Beverage Corp.	187000.00	-1.6%	26.6%	23019.70
Vietcombank	82000.00	2.2%	4.1%	88863.40	Vincom Retail	28600.00	-0.9%	-5.0%	44876.26
Sai Gon Thuong Tin Commercial	25400.00	1.6%	-19.4%	338493.10	Vietnam Rubber Group JSC	23500.00	-0.6%	-33.1%	284946.90
Techcombank	39250.00	1.2%	-21.5%	156733.10	Hoa Phat Group JSC	23500.00	-0.6%	-33.1%	284946.90
No Va Land Invest	82900.00	1.1%	-8.9%	209712.13	Masan Group Corp	111900.00	-0.6%	-20.9%	62238.78
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.	187000.00	197900.00	-5.5%	23019.70	Vingroup JSC	64900.00	64000.00	1.4%	51108.75
No Va Land Invest	82900.00	91000.00	-8.9%	209712.13	Vinhomes	59700.00	57520.56	3.8%	62679.03
Petrovietnam Gas	117300.00	130442.43	-10.1%	42005.13	Vietjet Aviation	123500.00	116800.00	5.7%	62738.00
Vinamilk	77700.00	87859.93	-11.6%	422967.72	Khang Dien House Trading & Investment	37750.00	33909.09	11.3%	38716.40
FPT Corp	86200.00	97944.43	-12.0%	86889.60	Asia Commercial JS Bank	24850.00	22000.00	13.0%	67216.77

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