

Daily Market Report

1 September 2022

JSE

JSE All-Share Index declined by 0.95% and closed at 67,257.13 points on Wednesday, as Financial sector recorded losses.

BRVM

BRVM Composite Index closed at 206.85 points, increased by 0.59% on Wednesday, with Solibra Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NGX All-Share Index increased by 0.39% to close at 49836.51 points on Wednesday, as the Consumer Goods, Banking and Industrial sectors recorded gains.

EGX

EGX 30 Index dropped by 1.32% and closed at 9,998.61 points on Wednesday, as the market capital LE 4.8 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index inched down by 0.09% to close at 908.00 points on Wednesday.

African Markets

Nigeria: NGX 30 Index increased by 0.38% and closed at 1,776.89 points on Wednesday. Guinness and Fidelity were the top gainers.

Egypt: EGX 30 Index dropped by 1.32% and closed at 9,998.61 points on Wednesday, as the market capital LE 4.8 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index increased marginally by 0.07% and closed at 1,751.20 points on Wednesday. Centum Investment Company and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index declined by 0.96% and closed at 60,735.70 points on Wednesday, as Financial sector recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 0.95%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.59%

NGX

Nigerian Stock Exchange ▲ 0.39%

EGX

Egyptian Stock Exchange ▼ 1.32%

ESG

Casablanca Stock Exchange ▼ 0.09%

Nigeria Key Indicators

Current

Inflation	19.64%
Exchange Rate	₦ 424.48

INTERBANK RATES

OPR	8.00 ▼
Overnight	8.67 ▼

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.88% and close at 9,874.51 points on Wednesday, as losses in the Financials, Real Estate and Energy sectors pushed shares lower. MSCI UAE dropped by 1.41% to close at 444.67 points.

Vietnam: VN-30 Index increased by 0.25% to close at 1301.44 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam was down by 0.14% to close at 818.56 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.38% to close at 12,283.33 points on Wednesday, as losses in the Capital Goods, Insurance and Pharma sectors pushed shares lower. MSCI Saudi Arabia fell by 1.57% to close at 1,709.07 points.

India: Nifty 50 Index was closed on Wednesday on account of Ganesh Chaturthi.

News

Nigeria:

Fidelity Bank Announce 21.6% PBT Growth, Propose 10 kobo Interim Dividend
Fed Govt disburses N471.9b SFTAS to states
Banks' assets rise 22% to N65tn

Kenya:

Britam's Half Year Profit Grows by 77% to Ksh 667.5 Million
Family Bank Reports 34% Rise in Half Year Profits to Ksh 1.6 Billion
KCB's Congo buyout target heavy on commission

Abu Dhabi:

OPEC oil output in August hits highest since pandemic's early days
Adnoc awards \$1.83bn of agreements for drilling-related services
Net profits of listed Dubai, Abu Dhabi firms jump 50% in Q2

Saudi Arabia:

Saudi telecom major stc shareholders approve 150% capital hike to \$13bn
Saudi Alhokair Group's board amends capital cut proposal to 51%
UK steel company secures \$865 million to build manufacturing plant in Saudi Arabia

Egypt:

Egypt allocates LE 376bln investments to improve services, job opportunities
Egypt approves exceptional measures to ease releasing imports
GlaxoSmithKline increases profits by 41-fold in 1H 2022

South Africa:

SA trade surplus widens to R24.76bn in July
Woolworths ups final dividend on stronger H2 performance
Aspen, India's Serum Institute sign vaccines deal for Africa

India:

India's GDP grows at 13.5% in Q1 of FY23
Fiscal deficit touches 20.5% of annual target in April-July: Official data
India Inc's foreign investment declines over 50% to \$1.11 billion in July

Vietnam:

Trade surplus hits nearly \$4 billion in 8 months
State budget collection reaches 85.6% of yearly target
Eight-month revenue from retail, services up 19.3%

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,874.51	-0.9%	-2.0%	0.0%	16.3%	AED/USD	3.67	0.0%	0.0%
Egypt	9,998.61	-1.3%	-2.8%	0.0%	-16.0%	EGP/USD	19.21	0.0%	22.3%
India	17,759.30	0.0%	1.1%	0.0%	2.3%	INR/USD	79.46	0.0%	6.9%
Kenya	1,751.20	0.1%	0.1%	0.0%	-8.0%	KES/USD	120.12	0.1%	6.2%
Nigeria	1,776.89	0.4%	0.3%	0.0%	3.2%	NGN/USD	428.95	0.2%	3.7%
Saudi Arabia	12,283.33	-1.4%	-2.4%	0.0%	8.4%	SAR/USD	3.76	0.0%	0.1%
South Africa	60,735.70	-1.0%	-4.4%	0.0%	-9.4%	ZAR/USD	17.11	0.8%	7.2%
Vietnam	1,301.44	0.3%	-0.4%	0.0%	-15.3%	VND/USD	23,450.60	0.1%	2.9%

MSCI Emerging Markets

MSCI Frontier	528.75	0.1%	-0.8%	0.0%	-20.6%	Brent Crude (\$)	96.49	-2.8%	24.1%
MSCI Frontier 100	1,231.71	0.1%	-0.9%	0.0%	-19.7%	Gold (\$)	1,726.20	-0.6%	-5.6%
MSCI Emerging	994.11	0.1%	-1.2%	0.0%	-19.3%	Copper (\$)	7,801.50	-0.8%	-19.7%
MSCI World (USD)	2,627.32	-0.7%	-2.5%	0.0%	-18.7%	Coffee (\$)	210.37	-0.8%	5.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guinness	87.90	9.9%	125.4%	80.81	Unilever	12.20	-7.2%	-9.0%	7.36
Transnational Corporation	1.13	8.7%	14.1%	7.52	Nigerian Breweries	45.50	-0.7%	-5.2%	35.37
Fidelity	3.19	4.9%	25.1%	63.77	FCMB	3.05	-0.7%	2.3%	7.86
Lafarge Africa	25.00	4.6%	5.5%	87.45	Zenith	21.90	-0.2%	-12.4%	132.26
Dangote Sugar	16.40	2.5%	-0.6%	51.19					
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%	0.09	Cap	16.50	15.25	8.2%	0.77
UACN	11.00	11.00	0.0%	3.40	Guaranty	19.85	18.00	10.3%	110.13
Transcorp Hotels	6.25	6.25	0.0%	0.00	Unilever	12.20	10.50	16.2%	7.36
Total	234.50	234.50	0.0%	1.49	UBN	5.60	4.65	20.4%	2.42
Seplat Petroleum	1300.00	1300.00	0.0%	50.76	Nascon	11.00	9.00	22.2%	1.56

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Emirates Driving Co.	22.00	8.9%	4.3%	3.93	Ras Al Khaimah Poultry	2.35	-6.0%	0.9%	0.00
ADC Acquisition Corp PJSC Warrants	1.45	7.4%	93.3%	0.68	Easylease motorcycle rentals	41.08	-5.4%	41.7%	16.84
AL SEER MARINE SUPPLIES & EQUIPMENT CO	9.82	4.6%	-29.4%	34.99	Arkan Building Materials Co.	1.19	-3.3%	-16.2%	9.12
PALMS SPORTS	10.98	3.9%	-10.1%	7.11	Abu Dhabi Commercial Bank	9.07	-3.0%	6.3%	43.33
Abu Dhabi Aviation	5.50	3.8%	12.2%	5.74	Abu Dhabi Islamic Bank	8.85	-2.9%	28.8%	33.04
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	Dana Gas PJSC	0.97	0.96	1.2%	6.94
Insurance House	0.85	0.85	0.0%	0.00	Arkan Building Materials	1.19	1.14	4.4%	9.08
National Bank of Fujairah	4.99	4.99	0.0%	0.00	National Corp for Tourism and Hotels	2.05	1.95	5.0%	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£)
Misr Fertilizers Production Company - Mopco	115.00	7.4%	18.0%	4.43	Eastern Company	9.75	-6.1%	-9.0%	35.15
Palm Hills Dev. Company	1.53	3.1%	-23.3%	31.91	Medinet Nasr Housing	2.94	-3.6%	29.4%	77.72
Sidi Kerir Petrochemicals - SIDPEC	7.50	0.8%	-3.8%	8.06	Commercial International Bank	38.15	-3.0%	-28.0%	323.25
Juhayna Food Industries	7.31	0.7%	-4.4%	4.03	Alexandria Containers and goods	9.97	-2.8%	18.7%	2.92
Abou Kir Fertilizers	25.28	0.3%	17.6%	8.81	GB AUTO	3.67	-2.7%	-28.0%	29.65
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£)
Misr Fertilizers Production Company - Mopco	115.00	115.00	0.0%	4.43	Cleopatra Hospital Company	4.02	3.97	1.3%	4.42
Tenth Of Ramadan Pharm. Industries & Diagnostic	2.85	2.96	-3.7%	1.80	Eastern Company	9.75	9.53	2.3%	35.15
Egyptian Kuwaiti Holding	24.34	25.50	-4.5%	0.04	Oriental Weavers	6.92	6.30	9.8%	2.58
Alexandria Mineral Oils Co.	4.07	4.48	-9.2%	5.37	Commercial International Bank	38.15	33.83	12.8%	323.25
Alexandria Containers and goods	9.97	11.02	-9.5%	2.92	Housing & Development Bank	36.01	31.01	16.1%	3.92

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finserv	16958.75	5.4%	3.4%	12895.537					
Bajaj Finance	7312.00	5.0%	4.8%	12517.30					
Indusind Bank	1105.05	4.3%	24.4%	3509.25					
Tech Mahindra	1076.25	3.9%	-39.9%	4751.68					
Icici Bank	889.00	3.9%	20.1%	11018.39					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	320.70	321.40	-0.2%	5684.20	Wipro	414.20	391.00	5.9%	4067.12
SBI Life Insurance	1330.00	1334.70	-0.4%	1436.73	Hcl Technologies	936.85	877.35	6.8%	2809.40
Coal India	234.60	235.50	-0.4%	3040.24	Divi's Laboratories	3613.00	3365.55	7.4%	1817.89
Mahindra & Mahindra	1309.00	1315.00	-0.5%	6626.65	Tata Consultancy Svs.	3210.00	2953.00	8.7%	10952.95
Bajaj Auto	4093.05	4128.95	-0.9%	3027.09	Infosys	1489.90	1367.15	9.0%	9992.70

*Market closed on 31/8

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	9.54	6.0%	-32.3%	0.06	Nairobi Securities Exchange Plc	7.60	-4.5%	1.1%	0.02
Nation Media Group	18.80	4.4%	1.9%	0.08	Diamond Trust Bank Limited	50.00	-2.9%	-16.0%	5.21
The Cooperative Bank of Kenya Ltd	12.40	0.8%	-4.2%	1.36	WPP Scangroup Plc	3.70	-2.4%	-10.6%	0.04
Kenya Power & Lighting Limited	1.46	0.7%	-16.6%	0.45	East African Breweries Limited	151.00	-1.3%	-8.5%	0.89
British American Tobacco Kenya Ltd	450.00	0.6%	1.9%	1.17	Safaricom Plc	27.95	-0.9%	-26.4%	340.20
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)
Total Kenya Ltd	24.95	26.30	-5.1%	0.08	Diamond Trust Bank Limited	50.00	48.00	4.2%	5.21
NCBA Group Plc	29.10	31.40	-7.3%	2.41	Kenya Reinsurance Corporation Ltd	2.05	1.92	6.8%	0.09
Stanbic Holdings	99.75	108.00	-7.6%	0.02	Kengen Limited	3.71	3.35	10.7%	0.78
Standard Chartered Bank Kenya Ltd	136.50	148.75	-8.2%	0.33	Kenya Power & Lighting Limited	1.46	1.30	12.3%	0.45
Absa Bank Kenya	11.85	12.95	-8.5%	0.22	Bamburi Cement Limited	34.65	30.85	12.3%	0.04

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
The Company for Cooperative Insurance	76.00	3.7%	-1.9%	42.71	Bawan Co.	39.00	-4.8%	11.3%	34.74
Saudi Industrial Services Co.	24.46	3.0%	-20.3%	49.99	SABIC Agri-Nutrients Co	174.00	-4.7%	-1.5%	628.47
Batic Investments and Logistics Co.	28.00	2.8%	14.1%	47.02	Riyad Bank	35.50	-4.7%	31.0%	121.97
Saudia Dairy and Foodstuff Co.	199.00	2.5%	20.6%	15.64	Sahara International Petrochemical Co.	47.75	-4.2%	13.7%	209.68
Buruj Cooperative Insurance Co.	19.50	2.2%	-11.8%	2.51	Rabigh Refining and Petrochemical Co.	17.32	-4.2%	-16.3%	147.21
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.	193.80	193.80	0.0%	31.59	Alkhabeer REIT Fund	7.70	7.70	0.0%	1.84
Scientific and Medical Equipment House Co.	70.00	70.00	0.0%	19.13	Allied Cooperative Insurance Group	15.66	15.66	0.0%	0.57
Elm Co.	344.00	344.00	0.0%	131.54	Gulf General Co-op Insurance Co.	8.80	8.80	0.0%	4.93
Almunajem Foods Co.	69.60	69.60	0.0%	39.75	National Shipping Co. of Saudi Arabia	29.40	29.40	0.0%	53.08
Saudi Tadawul Group Holding Co.	227.60	227.60	0.0%	70.56	Saudi Company for Hardware	36.00	36.00	0.0%	9.12

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Aspen Pharmacare Holdings	14750.00	5.3%	-34.3%	43643.63	Nedbank Group Ltd	20280.00	-6.1%	15.9%	52064.60
Northam Platinum Ltd	16120.00	5.0%	-23.1%	35984.80	Sasol Ltd	33183.00	-5.1%	28.1%	107120.96
Woolworths Holdings Ltd/South Africa	5600.00	4.8%	8.0%	51584.80	Discovery Ltd	12284.00	-4.2%	-14.4%	30609.10
Impala Platinum Holdings Ltd	18038.00	1.8%	-19.8%	73416.70	Glencore PLC	8975.00	-4.1%	12.8%	58482.35
Sibanye Stillwater Ltd	3849.00	1.7%	-21.6%	52465.76	Old Mutual Ltd	1017.00	-3.8%	-22.4%	39269.83
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)
British American Tobacco PLC	68486.00	73123.00	-6.3%	23359.89	Vodacom Group Ltd	12615.00	12555.00	0.5%	29316.38
Absa Group Ltd	17802.00	19536.00	-8.9%	56219.62	Old Mutual Ltd	1017.00	1002.00	1.5%	39269.83
Exxaro Resources Ltd	21832.00	23998.00	-9.0%	19009.60	MTN Group	12425.00	11963.00	3.9%	144872.92
Bidvest Group Ltd/The	21495.00	23636.00	-9.1%	22649.86	Discovery Ltd	12284.00	11740.00	4.6%	30609.10
Clicks Group Ltd	29802.00	32943.00	-9.5%	30782.01	Sanlam Ltd	5332.00	5065.00	5.3%	33673.53

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	58500.00	1.9%	4.5%	167070.15	Vincom Retail	27700.00	-2.5%	-8.0%	57117.40
Vinhomes	61000.00	1.8%	-23.4%	173075.30	Vietcombank	84000.00	-2.3%	6.6%	88695.60
Ho Chi Minh City Devp	26700.00	1.5%	-13.5%	63708.87	Khang Dien House Trading & Investment	37000.00	-1.9%	-20.2%	37987.90
Vietnam Prosperity	31800.00	1.4%	-11.2%	268913.52	Petrovietnam Gas	117100.00	-1.5%	25.0%	50271.03
PetroVietnam Power Corp	14000.00	1.1%	-20.0%	213068.80	Vinamilk	75500.00	-0.7%	-8.1%	125111.05
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.	187900.00	197900.00	-5.1%	23675.40	Vingroup JSC	63700.00	63000.00	1.1%	78784.16
Mobile World Inv. Corp	74000.00	80873.83	-8.5%	341880.00	Vietjet Aviation	121600.00	116800.00	4.1%	64010.24
No Va Land Invest	81900.00	91000.00	-10.0%	136142.37	Vinhomes	61000.00	57520.56	6.0%	173075.30
Petrovietnam Gas	117100.00	130442.43	-10.2%	50271.03	Khang Dien House Trading & Investment	37000.00	33909.09	9.1%	37987.90
FPT Corp	86600.00	97944.43	-11.6%	101642.42	Vincom Retail	27700.00	25100.00	10.4%	57117.40

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

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