

Daily Market Report

5 September 2022

JSE

JSE All-Share Index surged by 2.05% and closed at 67,378.31 points on Friday, as all sectors recorded gains.

BRVM

BRVM Composite Index closed at 204.76 points, down by 0.34% on Friday, with Air Liquide Côte d'Ivoire and Ecobank Transnational Inc being the top losers.

NSE

NGX All-Share Index increased by 0.31% to close at 50,045.83 points on Friday, as the Banking, Consumer Goods and Insurance sectors recorded gains.

EGX

EGX 30 Index increased by 0.60% and closed at 9,996.74 points on Sunday, as the market added LE 4.32 billion of market cap, amid Egyptian and foreign purchases.

ESG

Casablanca ESG 10 Index inched up by 0.01% to close at 905.15 points on Friday.

African Markets

Nigeria: NGX 30 Index increased by 0.43% and closed at 1,784.67 points on Friday. FCMB and Stanbic IBTC were the top gainers.

Egypt: EGX 30 Index increased by 0.60% and closed at 9,996.74 points on Sunday, as the market added LE 4.32 billion of market cap, amid Egyptian and foreign purchases.

Kenya: NSE 20 Index increased by 0.26% and closed at 1,763.40 points on Friday. Centum Investment Company and Kenya Power & Lighting were the top gainers.

South Africa: JSE Top 40 Index surged by 2.25% and closed at 60,854.02 points on Friday, as all sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 2.05%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.34%

NGX
Nigerian Stock Exchange ▲ 0.31%

EGX
Egyptian Stock Exchange ▲ 0.60%

ESG
Casablanca Stock Exchange ▲ 0.01%

Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 425.55
INTERBANK RATES	
OPR	12.00 ▲
Overnight	12.50 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.35% and close at 9,754.51 points on Friday, as gains in the Industrials, Telecommunications and Energy sectors pushed shares higher. MSCI UAE increased by 0.29% to close at 436.70 points.

Vietnam: VN-30 Index was closed on Friday on account of National day.

Saudi Arabia: Tadawul All Share Index increased by 0.43% to close at 12,194.29 points on Sunday, as gains in the Software & Services, Utilities and Banks sectors led shares higher. MSCI Saudi Arabia increased by 0.66% to close at 1,698.12 points.

India: Nifty 50 Index inched down 0.02% to close at 17,539.45 points on Friday, as losses in the Media, Financial Services and FMCG Sector Undertakings sectors led shares lower. MSCI India decreased 0.22% to close at 2,055.67 points.

News

Nigeria:

FG records N524.25bn fiscal deficit in one month
FG Generates N600bn VAT in Three Months
Chevron, Shell, Others to Remit N341bn JV Revenue to NNPC in Sept

Kenya:

Core inflation jumps to three-year high
Kenyan firms earn Sh6.9bn from Kwale titanium miner
Longhorn Reports a 1H Net Profit of Ksh 39.9 mn on Improved Sales

Abu Dhabi:

UAE's Pure Health to invest \$500 million in US healthcare firm Ardent
UAE-Bulgaria non-oil trade rises 40% in first half of 2022
Net profits of listed Dubai, Abu Dhabi firms jump 50% in Q2

Saudi Arabia:

Saudi investment funds see largest fall in 16 years
Formula Motorsport, Aramco to pioneer low-carbon fuels from 2023
Saudi insurance rivals Amana, ACIG unveil initial plans for possible merger

Egypt:

Finance minister unveils regulations on reduced customs tariffs
13 banks in Egyptian market report EGP 21.778bn net profits in 1H22
Cabinet, CBE discuss funding for strategic goods, production materials: PM

South Africa:

Truworths annual profit jumps on eased Covid measures
Sasol partners with Japan's Itochu for green hydrogen projects
Santam's first half deluged with claims worth R4.4bn arising from KZN floods

India:

Exports stay flat at \$33 billion in August; trade deficit widens to \$29 billion
India's external debt rises 8.2% to \$620.7 billion till March 2022
Economy forecast to grow by 7-7.5% in current fiscal

Vietnam:

Banks to soon complete Basel III international standards
Securities companies' race heats up amid low market liquidity
Agro, forestry, aquatic exports surge 13 per cent in eight months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,754.51	0.4%	0.0%	-1.2%	14.9%	AED/USD	3.67	0.0%	0.0%
Egypt	9,996.74	0.6%	0.6%	-0.02%	-16.1%	EGP/USD	19.22	0.0%	22.3%
India	17,539.45	-0.02%	0.0%	-1.2%	1.1%	INR/USD	79.80	0.3%	7.4%
Kenya	1,763.40	0.3%	0.0%	0.7%	-7.3%	KES/USD	120.18	0.1%	6.2%
Nigeria	1,784.67	0.4%	0.0%	0.4%	3.6%	NGN/USD	429.15	0.7%	3.7%
Saudi Arabia	12,194.29	0.4%	0.4%	-0.7%	7.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	60,854.02	2.2%	0.0%	0.2%	-9.2%	ZAR/USD	17.31	0.2%	8.4%
Vietnam	1,301.44	0.0%	0.0%	0.0%	-15.3%	VND/USD	23,444.30	0.0%	2.9%

MSCI Emerging Markets

MSCI Frontier	524.91	0.4%	0.0%	-0.7%	-21.1%	Brent Crude (\$)	93.02	0.7%	19.6%
MSCI Frontier 100	1,224.36	0.4%	0.0%	-0.6%	-20.1%	Gold (\$)	1,722.60	0.8%	-5.8%
MSCI Emerging	972.02	-0.4%	0.0%	-2.2%	-21.1%	Copper (\$)	7,633.00	0.5%	-21.5%
MSCI World (USD)	2,605.21	-0.2%	0.0%	-0.8%	-19.4%	Coffee (\$)	206.37	-1.0%	3.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.49	9.1%	17.1%	32.77	UBA	7.25	-0.7%	-9.4%	51.85
Stanbic IBTC	33.00	6.5%	-8.3%	19.02	Guaranty	19.80	-0.3%	-23.8%	258.52
Transnational Corporation	1.10	4.8%	11.1%	1.42					
Nigerian Breweries	47.00	3.3%	-2.1%	76.43					
Access	8.70	2.4%	-4.4%	31.93					
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%	1.17	Cap	16.50	15.25	8.2%	0.08
UACN	11.00	11.00	0.0%	8.23	Guaranty	19.80	18.00	10.0%	258.52
Transcorp Hotels	6.25	6.25	0.0%	0.00	Unilever	12.20	10.50	16.2%	3.19
Total	234.50	234.50	0.0%	12.06	UBN	5.60	4.65	20.4%	0.94
Seplat Petroleum	1300.00	1300.00	0.0%	60.54	Nascon	11.00	9.00	22.2%	0.41

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National for Building Materials	0.17	3.0%	-31.7%	0.01	Commercial Bank Intl	0.80	-9.9%	32.0%	0.00
RAK Properties PJSC	0.80	2.7%	4.0%	7.20	RAK Co. for White Cement & Construction	1.87	-8.8%	10.0%	0.10
Abu Dhabi Ports Company	5.06	2.2%	39.8%	28.97	Abu Dhabi Aviation	5.27	-4.2%	7.6%	1.45
Invictus Investment Company PLC	3.99	2.1%	-1.0%	8.53	National Corp for Tourism & Hotels	2.00	-2.4%	-33.3%	0.46
Methaq Takaful Ins.	0.67	2.0%	-17.7%	0.01	Response Plus Holding	7.72	-1.2%	-20.0%	10.08
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	0.95	0.95	0.2%	0.00
Insurance House	0.85	0.85	0.0%	0.00	National Corp for Tourism and Hotels	2.00	1.95	2.5%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.18	1.14	3.5%	0.00
Sharjah Insurance	1.38	1.38	0.0%	0.00	Waha Capital	1.30	1.24	4.8%	0.00
Emirates Insurance Co.	8.39	8.39	0.0%	0.00	Insurance House	0.85	0.81	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£)
Medinet Nasr Housing	3.08	5.5%	35.5%	65.42	Tenth Of Ramadan Pharma. Industries & Diagnostic-Rameda	2.78	-2.8%	15.8%	0.92
Ezz Steel	13.19	3.2%	-12.0%	13.58	Telecom Egypt	15.27	-1.0%	-8.9%	1.15
Eastern Company	10.30	3.0%	-3.9%	10.47	Commercial International Bank	38.00	-0.4%	-28.3%	74.72
Cleopatra Hospital Company	4.00	2.8%	-18.7%	3.26	Housing & Development Bank	35.53	-0.3%	-19.3%	1.39
GB AUTO	3.76	2.7%	-26.3%	14.81	Credit Agricole Egypt	6.10	-0.3%	-27.6%	3.65
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	110.00	115.00	-4.3%	2.04	Cleopatra Hospital Company	4.00	3.82	4.7%	3.26
Egyptian Kuwaiti Holding-EGP	24.03	25.50	-5.8%	4.06	Eastern Company	10.30	9.53	8.1%	10.47
Tenth Of Ramadan Pharma. Industries & Diagnostic-Rameda	2.78	2.96	-6.1%	0.92	Oriental Weavers	6.92	6.30	9.8%	2.36
Alexandria Mineral Oils Co.	4.04	4.48	-9.8%	5.41	Commercial International Bank	38.00	33.83	12.3%	74.72
Medinet Nasr Housing	3.08	3.42	-9.9%	65.42	Housing & Development Bank	35.53	31.01	14.6%	1.39

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ITC	323.35	1.8%	48.3%	8271.428	Bharat Petroleum	321.70	-2.9%	-16.5%	1576.46
Adani Ports And Sez.	852.75	1.8%	16.8%	7527.63	Shree Cement limited	21100.00	-2.3%	-21.8%	1851.53
HDFC	2440.00	1.5%	-5.7%	8873.25	Hindalco Industries	414.70	-1.7%	-12.8%	4211.62
Larsen & Toubro	1940.00	1.4%	2.3%	6201.73	Hero Motocorp	2828.00	-1.7%	14.9%	2210.71
Kotak Mahindra Bank	1920.00	0.9%	6.9%	6399.41	ONGC	132.60	-1.6%	-6.9%	2328.10
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	1314.00	1330.65	-1.3%	3064.00	Wipro	407.65	391.00	4.3%	2006.89
Icici Bank	871.50	890.75	-2.2%	7338.69	Hcl Technologies	924.85	877.35	5.4%	1619.61
Bajaj Auto	4037.80	4131.75	-2.3%	2249.19	Tata Consultancy Svs.	3127.40	2953.00	5.9%	6438.61
Eicher Motors	3429.40	3513.70	-2.4%	3569.82	Infosys	1452.95	1367.15	6.3%	7537.82
State Bank Of India	535.00	549.00	-2.6%	5363.10	Divi's Laboratories Limited	3590.00	3365.55	6.7%	1144.31

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	9.50	3.3%	-32.6%	0.06	Diamond Trust Bank Limited	50.00	-3.8%	-16.0%	5.26
Kenya Power & Lighting Limited	1.49	2.1%	-14.9%	0.79	Nation Media Group	18.05	-2.4%	-2.2%	0.36
NCBA Group Plc	30.20	2.0%	19.8%	1.07	Kenya Reinsurance Corporation Ltd	2.10	-0.5%	-8.7%	0.10
East African Breweries Limited	154.00	1.3%	-6.7%	9.42	The Cooperative Bank of Kenya Ltd	12.35	-0.4%	-4.6%	7.62
WPP Scangroup Plc	3.74	1.1%	-9.7%	0.09	KCB Group Plc	40.85	-0.4%	-10.1%	16.14
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)
NCBA Group Plc	30.20	31.40	-3.8%	1.07	Diamond Trust Bank Limited	50.00	48.00	4.2%	5.26
Absa Bank Kenya	12.00	12.95	-7.3%	0.79	Kenya Reinsurance Corporation Ltd	2.10	1.92	9.4%	0.10
Stanbic Holdings	100.00	108.00	-7.4%	0.00	Kengen Limited	3.71	3.35	10.7%	1.58
Standard Chartered Bank Kenya Ltd	136.50	148.75	-8.2%	0.60	Bamburi Cement Limited	34.25	30.85	11.0%	0.20
Total Kenya Ltd	23.30	26.30	-11.4%	0.02	British American Tobacco Kenya Ltd	449.75	400.00	12.4%	3.69

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
The National Company for Glass Industries	40.85	5.7%	-7.2%	167.41	Alinma Tokio Marine Co.	23.88	-4.5%	-23.9%	19.38
Saudi Marketing Co.	24.12	5.5%	-16.3%	14.19	Retal Urban Development Co.	131.00	-3.7%	8.3%	27.49
Saudi Ceramic Co.	45.60	5.0%	-17.2%	51.49	Taleem REIT Fund	12.60	-3.2%	2.4%	1.06
National Gas and Industrialization Co.	60.90	3.4%	12.4%	91.65	Saudi Arabian Amiantit Co.	39.30	-3.2%	119.6%	4.92
Saudi Printing and Packaging Co.	20.40	3.3%	-7.1%	10.21	Alkhorayef Water and Power Technologies Co.	121.80	-2.7%	18.9%	6.34
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)
Retal Urban Development Co.	131.00	131.00	0.0%	27.49	Alkhabeer REIT Fund	7.69	7.69	0.0%	0.92
Nahdi Medical Co.	192.00	192.00	0.0%	8.37	Allied Cooperative Insurance Group	15.50	15.50	0.0%	14.03
Scientific and Medical Equipment House Co.	69.90	69.90	0.0%	15.25	Gulf General Co-op Insurance Co.	8.72	8.72	0.0%	2.47
Elm Co.	353.80	353.80	0.0%	67.51	Gulf Union Alahlia	9.50	9.50	0.0%	0.43
Almunajem Foods Co.	68.60	68.60	0.0%	16.89	National Shipping Co. of Saudi Arabia	29.15	29.15	0.0%	51.58

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings Ltd	17819.00	5.3%	-20.8%	59259.79	Aspen Pharmacare Holdings Ltd	15115.00	-3.7%	-32.7%	18117.11
Gold Fields Ltd	12850.00	4.9%	-18.9%	31306.35	SPAR Group Ltd/The	15540.00	-1.7%	-7.0%	12009.59
AngloGold Ashanti Ltd	23274.00	4.6%	-29.2%	29586.47	Shoprite Holdings Ltd	23203.00	-0.7%	11.1%	32918.44
Northam Platinum Ltd	15743.00	4.5%	-24.9%	14163.28	Discovery Ltd	12261.00	-0.1%	-14.6%	16902.81
Sibanye Stillwater Ltd	3821.00	4.1%	-22.2%	37956.82					
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	69080.00	73123.00	-5.5%	42251.95	Vodacom Group Ltd	12850.00	12369.00	3.9%	16725.10
Shoprite Holdings Ltd	23203.00	24723.00	-6.1%	32918.44	Discovery Ltd	12261.00	11740.00	4.4%	16902.81
Absa Group Ltd	18043.00	19536.00	-7.6%	150744.25	Growthpoint Properties Ltd	1268.00	1207.00	5.1%	11537.26
Bidvest Group Ltd/The	21770.00	23636.00	-7.9%	7773.68	NEPI Rockcastle PLC	8918.00	8450.00	5.5%	5399.63
Exxaro Resources Ltd	21916.00	23998.00	-8.7%	15360.18	MTN Group	12649.00	11963.00	5.7%	74556.87

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

*Market closed on 2/9

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