

Daily Market Report

6 September 2022

JSE

JSE All-Share Index inched up by 0.03% and closed at 67,399.39 points on Monday, as Materials and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 204.13 points, up by 0.03% on Monday, with Servair Abidjan Côte d'Ivoire and SMB Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was down by 0.11% to close at 49,991.41 points on Monday, as the Banking, Industrial and Insurance sectors recorded losses.

EGX

EGX 30 Index jumped by 1.81% and closed at 10,177.64 points on Monday, as the market added LE 11.12 billion to the market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index was up by 0.11% to close at 906.10 points on Monday.

African Markets

Nigeria: NGX 30 Index decreased by 0.13% and closed at 1,782.36 points on Monday. Lafarge Africa and Stanbic IBTC were the top losers.

Egypt: EGX 30 Index jumped by 1.81% and closed at 10,177.64 points on Monday, as the market added LE 11.12 billion to the market cap, amid Egyptian purchases.

Kenya: NSE 20 Index increased by 0.45% and closed at 1,771.36 points on Monday. Total Kenya and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index inched down by 0.02% and closed at 60,843.90 points on Monday, as Industrial sector recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.03%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.03%

NGX

Nigerian Stock Exchange ▼ 0.11%

EGX

Egyptian Stock Exchange ▲ 1.81%

ESG

Casablanca Stock Exchange ▲ 0.11%

Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 426.28
INTERBANK RATES	
OPR	12.67 ▲
Overnight	13.17 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.69% and close at 9,686.81 points on Monday, as losses in the Real Estate, Telecommunications and Energy sectors pushed shares lower. MSCI UAE fell by 1.86% to close at 428.59 points.

Vietnam: VN-30 Index was down by 0.25% to close at 1,298.15 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.42% to close at 822.02 points.

Saudi Arabia: Tadawul All Share Index declined by 0.77% to close at 12,099.84 points on Monday, as losses in the Pharma, Consumer Durables and Capital Goods sectors pushed shares lower. MSCI Saudi Arabia declined by 0.73% to close at 1,685.69 points.

India: Nifty 50 Index increased 0.72% to close at 17,665.80 points on Monday, as gains in the Media, Financial Services and Banking sectors led shares higher. MSCI India increased 0.47% to close at 2,065.34 points.

News

Nigeria:

OPEC approves 1.826mb/d output for Nigeria
GTCC Announces 11% Increase in PBT,
Declares N0.30 Interim Dividend
FG suspends 5% telecoms tax on calls, data

Kenya:

Kenya's Forex Reserves Fall to a 5-year Low on the Weakening Shilling
Foreigners' share sale drops at NSE in August
KCB's stake in Rwanda unit rises by 10.8pc after merger

Abu Dhabi:

OPEC+ agrees oil output cut to prop up prices
UAE businesses benefit from fuel price drop; Aug PMI at 38-month high of 56.7
NPCC bags \$548 mn ADNOC contract to build new main gas line

Saudi Arabia:

Saudi Arabia's non-oil economy growth at 10-month high: S&P Global
OPEC+ gives Saudi chairman power to intervene to address market developments
Saudi Industrial Devpt Fund approves \$20bn loans since Vision 2030 launch

Egypt:

Egypt's August PMI for non-oil business reaches highest level since Feb
Egypt's CBE sells short term T-bills for EGP 61.8 bln; highest in 2022
Abu Qir Fertilizers to get about \$100m loan from NBK

South Africa:

Record inflation slows SA's manufacturing PMI in August
MTN cuts debt with early settlement of R5.2bn in euro bonds
Old Mutual buys full stake in specialist insurer Genric+

India:

FPI inflows hit 20-mth high of Rs 51,000 crore in Aug
Tata Sons plans to raise \$4 billion to breathe life into Air India: Report
Inflation rate likely rose to 6.9% in August: Report

Vietnam:

Vietnam, Laos aiming for 2 billion USD in bilateral trade
Agricultural sector persists 50 billion USD export target
Reference exchange rate up 8 VND after holiday

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,686.81	-0.7%	-0.7%	-1.9%	14.1%	AED/USD	3.67	0.0%	0.0%
Egypt	10,177.64	1.8%	2.4%	1.8%	-14.5%	EGP/USD	19.21	0.0%	22.3%
India	17,665.80	0.7%	0.7%	-0.5%	1.8%	INR/USD	79.85	0.1%	7.4%
Kenya	1,771.36	0.5%	0.5%	1.2%	-6.9%	KES/USD	120.25	0.1%	6.3%
Nigeria	1,782.36	-0.1%	-0.1%	0.3%	3.5%	NGN/USD	434.22	1.2%	4.9%
Saudi Arabia	12,099.84	-0.8%	-0.4%	-1.5%	6.8%	SAR/USD	3.76	0.0%	0.1%
South Africa	60,843.90	-0.02%	-0.02%	0.2%	-9.3%	ZAR/USD	17.17	-0.8%	7.6%
Vietnam	1,298.15	-0.3%	-0.3%	-0.3%	-15.5%	VND/USD	23,498.00	0.2%	3.1%

MSCI Emerging Markets

MSCI Frontier	523.25	-0.3%	-0.3%	-1.0%	-21.4%	Brent Crude (\$)	94.95	2.1%	22.1%
MSCI Frontier 100	1,220.70	-0.3%	-0.3%	-0.9%	-20.4%	Gold (\$)	1,724.80	0.1%	-5.7%
MSCI Emerging	967.80	-0.4%	-0.4%	-2.6%	-21.4%	Copper (\$)	7,653.50	0.3%	-21.3%
MSCI World (USD)	2,596.70	-0.3%	-0.3%	-1.2%	-19.6%	Coffee (\$)	204.63	-0.8%	3.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Flour Mills	29.30	4.5%	3.4%	23.68	Lafarge Africa	23.95	-4.2%	1.1%	22.52
Nigerian Breweries	48.75	3.7%	1.6%	20.82	Stanbic IBTC	32.00	-3.0%	-11.1%	34.86
Fidelity	3.46	1.8%	35.7%	39.74	Zenith	21.00	-2.3%	-16.0%	203.08
Access	8.75	0.6%	-3.8%	18.61	Sterling	1.46	-2.0%	-2.7%	131.90
Guaranty	19.90	0.5%	-23.5%	199.23	UBA	7.15	-1.4%	-10.6%	76.76
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%	2.20	Cap	16.50	15.25	8.2%	0.20
UACN	11.00	11.00	0.0%	10.66	Guaranty	19.90	18.00	10.6%	199.23
Transcorp Hotels	6.25	6.25	0.0%	0.02	Unilever	12.20	10.50	16.2%	2.56
Total	234.50	234.50	0.0%	0.07	UBN	5.60	4.65	20.4%	3.12
Seplat Petroleum	1300.00	1300.00	0.0%	38.47	Nascon	11.00	9.00	22.2%	0.21

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Co. for White Cement & Construction	2.00	7.0%	17.6%	0.00	Gulf Cement	0.48	-8.0%	-32.1%	0.02
Al Seer Marine Supplies & Equipment Co	10.20	3.0%	-26.6%	22.77	Manazel PJSC	0.40	-4.4%	-24.6%	5.21
Fertiglobe PLC	5.50	1.9%	56.3%	15.13	Eshraq Investments	0.58	-3.3%	62.9%	8.98
RESPONSE PLUS HOLDING	7.84	1.6%	-18.8%	10.31	Emirates Telecom	24.50	-3.2%	-22.7%	69.63
GHITHA HOLDING P.J.S.C.	82.00	1.5%	198.2%	27.33	Abu Dhabi Aviation	5.10	-3.2%	4.1%	1.13
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	0.94	0.93	0.2%	5.48
Insurance House	0.85	0.85	0.0%	0.00	National Corp for Tourism & Hotels	2.00	1.95	2.5%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Arkan Building Materials	1.17	1.14	2.6%	4.41
Sharjah Insurance	1.38	1.38	0.0%	0.00	Waha Capital	1.29	1.24	4.0%	0.18
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£)
Telecom Egypt	17.68	15.8%	5.4%	57.35	Egyptian Kuwaiti Holding-EGP	23.69	-1.4%	20.6%	53.96
Ezz Steel	14.33	8.6%	-4.4%	62.22	Abou Kir Fertilizers	24.76	-0.7%	15.2%	67.12
Citadel Capital - Common Shares	1.40	6.9%	16.1%	103.42	GB AUTO	3.74	-0.5%	-26.7%	18.82
E-finance For Digital and Financial Investments	15.11	4.4%	-25.5%	25.47	Eastern Company	10.25	-0.5%	-4.4%	6.15
Palm Hills Development Co.	1.53	3.7%	-23.3%	9.89					
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%	0.27	Cleopatra Hospital Company	4.05	3.82	6.0%	11.40
Tenth Of Ramadan Pharma. Industries & Diagnostic-Rameda	2.78	2.96	-6.1%	0.21	Eastern Company	10.25	9.53	7.6%	6.15
Egyptian Kuwaiti Holding-EGP	23.69	25.50	-7.1%	53.96	Oriental Weavers	6.92	6.30	9.8%	2.86
Alexandria Mineral Oils Company	4.10	4.48	-8.5%	5.08	Commercial Intl. Bank(Egypt)	38.30	33.83	13.2%	144.08
Alexandria Containers and goods	10.04	11.02	-8.9%	1.42	Housing & Development Bank	35.96	31.01	16.0%	0.87

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	428.80	3.4%	-9.8%	6272.552	Bajaj Auto	3962.00	-1.7%	21.9%	3188.20
Jsw Steel	682.00	3.1%	4.0%	3336.48	Nestle India Limited	19227.00	-1.7%	-2.4%	961.82
NTPC	164.70	1.8%	32.4%	2498.59	Britannia Inds.	3663.00	-1.1%	1.6%	861.86
ITC	328.75	1.7%	50.8%	5713.66	Ultratech Cement	6508.40	-1.1%	-14.3%	2522.90
Sun Pharma Industries	883.30	1.6%	4.4%	2464.74	Eicher Motors	3396.40	-0.8%	31.0%	1910.65
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	1317.25	1330.65	-1.0%	2986.53	Wipro	405.75	391.00	3.8%	3656.95
NTPC	164.70	166.40	-1.0%	2498.59	Tata Consultancy Svs.	3140.00	2953.00	6.3%	6734.11
Icici Bank	881.25	890.75	-1.1%	7718.86	Hcl Technologies	935.00	877.35	6.6%	2136.09
State Bank Of India	538.75	549.00	-1.9%	4216.31	Divi's Laboratories Limited	3594.85	3365.55	6.8%	996.21
Coal India	231.90	236.80	-2.1%	1134.04	Infosys	1461.25	1367.15	6.9%	5356.74

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	24.80	6.4%	-0.8%	0.17	Stanbic Holdings	96.00	-4.0%	10.0%	0.01
NCBA Group Plc	31.40	4.0%	24.6%	11.72	The Cooperative Bank of Kenya Ltd	12.05	-2.4%	-6.9%	92.59
Safaricom Plc	29.05	3.6%	-23.5%	124.38	Nairobi Securities Exchange Plc	7.92	-1.2%	5.3%	0.06
Centum Investment Company Plc	9.78	2.9%	-30.6%	0.20	Standard Chartered Bank Kenya Ltd	136.00	-0.4%	6.0%	13.36
Kenya Power & Lighting Limited	1.52	2.0%	-13.1%	0.97	Equity Group Holdings Plc	48.10	-0.1%	-8.8%	70.54
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	31.40	31.90	-1.6%	11.72	Diamond Trust Bank Limited	50.25	48.00	4.7%	10.64
Total Kenya Ltd	24.80	26.30	-5.7%	0.17	Kenya Reinsurance Corporation Ltd	2.10	1.92	9.4%	0.08
Absa Bank Kenya	12.00	12.95	-7.3%	16.89	Kengen Limited	3.73	3.35	11.3%	0.60
Standard Chartered Bank Kenya Ltd	136.00	148.75	-8.6%	13.36	Bamburi Cement Limited	34.50	30.85	11.8%	1.64
Stanbic Holdings	96.00	108.00	-11.1%	0.01	Standard Chartered Bank Kenya Ltd	136.00	121.00	12.4%	13.36

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Rajhi Company for Cooperative Insurance	108.60	9.9%	39.8%	80.68	Saudi Tadawul Group Holding Co.	230.00	-5.4%	82.8%	173.80
Naseej International Trading Co	47.65	4.2%	66.6%	49.74	Riyad REIT Fund	11.46	-4.7%	16.3%	9.86
Etihad Etisalat Co.	38.30	3.5%	23.0%	79.17	National Gas and Industrialization Co.	58.40	-4.1%	7.7%	31.62
The Company for Cooperative Insurance	74.70	3.5%	-3.6%	29.99	ACWA POWER Co.	160.80	-4.1%	91.4%	141.88
AlAhl REIT Fund 1	11.20	3.3%	-1.8%	1.16	Mouwasat Medical Services Co.	241.60	-3.5%	39.0%	21.69
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.	132.40	132.40	0.0%	29.51	Alkhabeer REIT Fund	7.71	7.71	0.0%	1.01
Nahdi Medical Co.	197.00	197.00	0.0%	38.43	Allied Cooperative Insurance Group	15.58	15.58	0.0%	1.29
Scientific and Medical Equipment House Co.	67.80	67.80	0.0%	10.24	Gulf General Co-op Insurance Co.	8.73	8.73	0.0%	2.85
Elm Co.	342.80	342.80	0.0%	71.19	National Shipping Co. of Saudi Arabia	29.20	29.20	0.0%	26.34
Almunajem Foods Co.	68.10	68.10	0.0%	14.76	Saudi Company for Hardware	35.00	35.00	0.0%	2.23

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
AngloGold Ashanti Ltd	23993.00	3.1%	-27.0%	43349.57	Prosus NV	101464.00	-3.2%	-22.5%	125540.39
Glencore PLC	12850.00	2.8%	17.3%	34660.57	Aspen Pharmacare Holdings Ltd	14736.00	-2.5%	-34.3%	13350.68
Impala Platinum Holdings Ltd	18305.00	2.7%	-18.6%	31541.47	Mondi PLC	28531.00	-2.3%	-27.8%	26967.82
Absa Group Ltd	18429.00	2.1%	20.8%	206206.76	Cie Financiere Richemont SA	18577.00	-1.8%	-23.0%	62546.21
Capitec Bank Holdings Ltd	212628.00	1.6%	5.0%	34260.75	Naspers Ltd	239735.00	-1.2%	-3.0%	257443.03
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	12850.00	12369.00	3.9%	16049.55
Absa Group Ltd	18429.00	19536.00	-5.7%	206206.76	NEPI Rockcastle PLC	8822.00	8450.00	4.4%	6941.81
British American Tobacco PLC	68613.00	73123.00	-6.2%	26644.42	Discovery Ltd	12356.00	11740.00	5.2%	9850.72
Bidvest Group Ltd/The	21993.00	23636.00	-7.0%	19705.66	Growthpoint Properties Ltd	1280.00	1207.00	6.0%	15061.19
Exxaro Resources Ltd	22100.00	23998.00	-7.9%	20331.27	Sibanye Stillwater	3846.00	3608.00	6.6%	19135.28

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group JSC	23900.00	3.9%	-31.9%	628142.19	Mobile World Inv. Corp	72500.00	-2.0%	7.4%	195329.50
Vietnam Rubber Group JSC	23900.00	3.9%	-31.9%	628142.19	Viet Nam International Commercial Joint Stock Bank	24550.00	-1.8%	-29.9%	37951.85
Vinamilk	77500.00	2.6%	-5.7%	245628.50	Vietcombank	82600.00	-1.7%	4.8%	127848.28
BaoViet Holdings	59600.00	1.9%	6.4%	154763.32	Vietnam Prosperity	31300.00	-1.6%	-12.6%	373609.32
Masan Group Corp	115500.00	0.9%	-18.4%	64310.40	Vietjet Aviation	120000.00	-1.3%	-6.5%	66552.00
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.	188000.00	197900.00	-5.0%	19909.20	Vingroup JSC	64000.00	63000.00	1.6%	83846.40
Mobile World Inv. Corp	72500.00	80873.83	-10.4%	195329.50	Vietjet Aviation	120000.00	116800.00	2.7%	66552.00
No Va Land Invest	81500.00	91000.00	-10.4%	226953.05	Vinhomes	61000.00	57520.56	6.0%	93299.50
Petrovietnam Gas	116400.00	130442.43	-10.8%	37888.20	Khang Dien House Trading & Investment	36800.00	33909.09	8.5%	34139.36
Vinamilk	77500.00	87859.93	-11.8%	245628.50	Vincom Retail	27550.00	25100.00	9.8%	40360.75

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