

Daily Market Report

13 September 2022

JSE

JSE All-Share Index jumped up by 1.55% and closed at 69,772.41 points on Monday, as Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 203.76 points, up marginally by 0.09% on Monday, with SMB Côte d'Ivoire and Tractafric Motors Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was down by 0.14% to close at 49,625.71 points on Monday, as the Banking, Industrial and Insurance sectors recorded losses.

EGX

EGX 30 Index increased by 0.75% and closed at 10,434.1 points on Monday, as the market added LE 3.84 billion to the market cap, amid Egyptian purchases.

ESG

Casablanca ESG 10 Index slipped by 0.03% to close at 905.63 points on Monday.

African Markets

Nigeria: NGX 30 Index decreased by 0.12% and closed at 1,770.28 points on Monday. Fidelity and FCMB were the top losers.

Egypt: EGX 30 Index increased by 0.75% and closed at 10,434.1 points on Monday, as the market added LE 3.84 billion to the market cap, amid Egyptian purchases.

Kenya: NSE 20 Index inched down by 0.01% and closed at 1,787.30 points on Monday. Nation Media Group and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index jumped by 1.59% and closed at 63,111.95 points on Monday, as Industrial and Financial sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.55%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.09%

NGX
Nigerian Stock Exchange ▼ 0.14%

EGX
Egyptian Stock Exchange ▲ 0.75%

ESG
Casablanca Stock Exchange ▼ 0.03%

Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 428.51
INTERBANK RATES	
OPR	11.50 ▲
Overnight	12.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index climbed by 1.37% and close at 9,930.24 points on Monday, as gains in the Real Estate, Industrials and Telecommunication sectors pushed shares higher. MSCI UAE rose by 2.12% to close at 432.87 points.

Vietnam: VN-30 Index slipped by 0.003% to close at 1,275.60 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam inched down by 0.004% to close at 811.12 points.

Saudi Arabia: Tadawul All Share Index increased by 0.68% to close at 12,022.12 points on Monday, as gains in the Software & Services, Media & Entertainment and Utilities sectors pushed shares higher. MSCI Saudi Arabia increased by 0.77% to close at 1,671.30 points.

India: Nifty 50 Index increased by 0.58% to close at 17,936.35 points on Monday, as gains in the Bank, Auto and IT sectors pushed shares higher. MSCI India increased by 0.83% to close at 2,103.34 points.

News

Nigeria:

Flour Mills gets approval to unbundle in massive restructuring
NGX Group to raise N35b new capital in hybrid IPO
Fidelity Bank plans to issue 3.04b shares to private investors

Kenya:

Kenya's current account deficit narrows to 5.1pc
Kenya-DRC Trade set to Rise after Officials Toured the Port
NSE Extends Fees Waiver on Equity Day Trades

Abu Dhabi:

UAE economy set to grow at the fastest pace since 2011 after beating estimates
Abu Dhabi's ADDED registers 136 new industrial licenses in H1 2022
Defence PSUs to hold roadshows in Dubai, Abu Dhabi to woo investors

Saudi Arabia:

Saudi Arabia announces three new iron and steel projects worth \$9.3bn
Saudi Arabia's new \$30bn RIA airlines to launch with Boeing 737s, Airbus A320s
Saudi Jahez International H1 net profit soars 85% to \$14m

Egypt:

Egypt's trade deficit dips 12.4% to \$3.21 in June
CBE, AfDB ink MoU on hosting 2023 annual meetings in Sharm El-Sheikh
First Abu Dhabi close to complete merging with Bank Audi Egypt

South Africa:

Hersov to approach SA with R2bn bid to buy six regional airports
South African renewable energy projects reach R4bn financial close
FirstRand expects its annual earnings to rise

India:

Retail inflation up in August to 7%, IIP slows sharply
Industrial output growth at 4-month low of 2.4% in July
India plans \$2.5 billion aid to oil firms hit by soaring costs

Vietnam:

Vietnam runs trade surplus of 3 billion USD with UAE
Vietnam sees Q3 GDP growth above 7%, but warns of external shocks
Reference exchange rate down 10 VND at week's beginning

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,930.24	1.4%	1.4%	0.6%	17.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,434.10	0.8%	1.6%	4.4%	-12.4%	EGP/USD	19.34	0.1%	23.1%
India	17,936.35	0.6%	0.6%	1.0%	3.4%	INR/USD	79.53	-0.1%	7.0%
Kenya	1,787.30	-0.01%	-0.01%	2.1%	-6.1%	KES/USD	120.41	0.1%	6.4%
Nigeria	1,770.28	-0.1%	-0.1%	-0.4%	2.8%	NGN/USD	435.38	0.0%	5.2%
Saudi Arabia	12,022.12	0.7%	1.6%	-2.1%	6.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	63,111.95	1.6%	1.6%	3.9%	-5.9%	ZAR/USD	17.13	-1.0%	7.3%
Vietnam	1,275.60	-0.003%	-0.003%	-2.0%	-16.9%	VND/USD	23,514.00	0.0%	3.2%

MSCI Emerging Markets

MSCI Frontier	526.51	0.4%	0.4%	-0.4%	-20.9%	Brent Crude (\$)	94.00	1.2%	20.9%
MSCI Frontier 100	1,228.09	0.2%	0.2%	-0.3%	-19.9%	Gold (\$)	1,740.60	0.7%	-4.8%
MSCI Emerging	979.05	0.9%	0.9%	-1.5%	-20.5%	Copper (\$)	7,955.50	1.3%	-18.2%
MSCI World (USD)	2,719.01	1.3%	1.3%	3.5%	-15.9%	Coffee (\$)	204.41	1.8%	2.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Sterling	1.50	2.0%	0.0%	9.35	Fidelity	3.41	-6.6%	33.7%	20.02
Axamansard	1.80	1.1%	-19.3%	0.57	FCMB	3.30	-5.7%	10.7%	3.75
Transnational Corporation	1.08	0.9%	9.1%	4.69	FBNH	10.25	-3.3%	-10.9%	13.48
Guaranty	19.80	0.5%	-23.8%	385.59	Lafarge Africa	24.20	-2.8%	2.1%	13.86
Dangote Sugar	16.60	0.3%	0.6%	28.40	UBA	7.50	-0.7%	-6.3%	39.26
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%	1.74	Guaranty	19.80	18.00	10.0%	385.59
UACN	11.00	11.00	0.0%	0.79	Cap	17.75	15.25	16.4%	2.49
Transcorp Hotels	6.25	6.25	0.0%	0.01	Nascon	11.00	9.00	22.2%	0.09
Total	234.50	234.50	0.0%	1.11	Stanbic IBTC	30.00	24.50	22.4%	61.34
Seplat Petroleum	1300.00	1300.00	0.0%	21.47	Unilever	13.35	10.50	27.1%	0.92

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sharjah Insurance	1.50	8.7%	41.5%	0.36	National Marine Dredging	24.12	-3.2%	85.0%	18.22
PALMS SPORTS	11.48	6.3%	-6.1%	12.49	Al Yah Satellite Communications	2.79	-1.1%	1.5%	8.10
Multiply Group PJSC	2.38	5.3%	29.3%	182.04	GFH Financial Group B.S.C	1.07	-0.9%	-8.5%	0.77
Emirates Driving Co.	24.90	4.6%	18.0%	11.79	Abu Dhabi National Energy	1.23	-0.8%	-6.8%	0.40
Q HOLDING PSC	4.20	4.5%	-4.8%	54.26	Adnoc Drilling Company	3.46	-0.6%	1.8%	19.43
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	0.93	0.92	0.8%	0.00
Insurance House	0.85	0.85	0.0%	0.00	Arkan Building Materials	1.13	1.12	0.9%	0.00
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Emirates Telecom	23.58	23.34	1.0%	0.00
Sharjah Insurance	1.50	1.50	0.0%	0.36	National Corp for Tourism & Hotels	2.00	1.95	2.5%	0.00
International Holding	360.00	360.00	0.0%	0.00	Waha Capital	1.28	1.24	3.2%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Fawry For Banking Tech And Electronic Payment	4.18	3.5%	-67.4%	124.83	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.67	-4.6%	-84.1%	3.38
Telecom Egypt	17.33	3.0%	91.1%	46.48	Orascom Construction PLC	67.03	-2.4%	874.3%	5.98
Eastern Company	10.54	2.8%	-1.7%	5.56	Abou Kir Fertilizers	25.00	-1.6%	16.3%	50.32
Juhayna Food Industries	7.73	2.8%	1.0%	0.85	Housing & Development Bank	36.81	-1.3%	-16.4%	2.97
Egyptian Kuwaiti Holding	24.00	1.8%	22.1%	20.55	Ezz Steel	14.64	-1.2%	-67.4%	124.83
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	108.80	115.00	-5.4%	2.68	Cleopatra Hospital Company	4.05	3.82	6.0%	15.86
Medinet Nasr Housing	3.23	3.42	-5.6%	54.87	Oriental Weavers	6.95	6.30	10.3%	3.20
Alexandria Mineral Oils Company	4.23	4.48	-5.6%	7.05	Eastern Company	10.54	9.53	10.6%	5.56
Egyptian Kuwaiti Holding	24.00	25.50	-5.9%	20.55	Commercial International Bank	39.61	33.83	17.1%	184.01
Alexandria Containers and goods	10.31	11.02	-6.4%	1.52	T M G Holding	7.63	6.50	17.4%	14.59

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	941.00	3.8%	28.9%	11717.576	Coal India	231.60	-2.5%	58.6%	4424.15
Titan Company	2668.00	2.5%	5.8%	2138.67	Shree Cement limited	24130.00	-1.5%	-10.6%	4240.59
Tech Mahindra	1151.00	2.2%	-35.7%	6041.00	Nestle India Limited	18890.10	-0.9%	-4.1%	829.41
Divi's Laboratories Limited	3679.00	2.1%	-21.4%	1718.33	HDFC	2419.15	-0.5%	-6.5%	7709.18
Axis Bank	800.20	2.0%	17.9%	12385.97	Hdfc Bank	1491.60	-0.5%	0.8%	8299.68
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Eicher Motors	3537.55	3553.00	-0.4%	2680.97	Wipro	421.75	391.00	7.9%	2467.42
Icici Bank	907.00	911.95	-0.5%	5450.90	Hcl Technologies	954.10	877.35	8.7%	2413.56
State Bank Of India	554.95	558.60	-0.7%	5377.06	Divi's Laboratories Ltd	3679.00	3365.55	9.3%	1718.33
ITC	330.90	333.30	-0.7%	2882.51	Tata Consultancy Svs.	3238.00	2953.00	9.7%	5807.18
Bharti Airtel	768.85	781.80	-1.7%	2041.13	Infosys	1534.40	1367.15	12.2%	8454.33

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.76	10.0%	2.9%	16.49	Nation Media Group	18.05	-4.2%	16.8%	4.17
Centum Investment Company Plc	9.58	5.3%	-40.3%	0.40	WPP Scangroup Plc	3.60	-2.7%	-40.0%	0.14
NCBA Group Plc	33.10	0.3%	23.7%	14.72	Safaricom Plc	28.65	-2.1%	-16.4%	377.10
Kengen Limited	3.71	0.3%	-21.2%	1.50	Equity Group Holdings Plc	47.85	-1.5%	30.9%	170.11
Standard Chartered Bank Kenya Ltd	139.25	0.2%	-3.5%	0.45	KCB Group Plc	41.80	-1.5%	9.7%	149.13
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	33.10	33.25	-0.5%	14.72	Diamond Trust Bank Limited	50.25	48.00	4.7%	0.53
Total Kenya Ltd	24.85	26.40	-5.9%	0.03	Stanbic Holdings	93.50	85.50	9.4%	0.01
Standard Chartered Bank Kenya Ltd	139.25	148.75	-6.4%	0.45	Kengen Limited	3.71	3.35	10.7%	1.50
Absa Bank Kenya	11.95	12.95	-7.7%	2.04	Bamburi Cement Limited	34.40	30.85	11.5%	1.61
Nairobi Securities Exchange Plc	7.96	8.84	-10.0%	0.03	Kenya Reinsurance Corporation Ltd	2.15	1.92	12.0%	0.05

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tihama Advertising and Public Relations Co.	112.00	7.5%	196.7%	66.72	Lazurde Company for Jewelry	15.76	-3.4%	-23.2%	44.73
Saudi Chemical Co.	30.90	6.7%	-8.8%	17.83	Saudi Enaya Co-op Insurance Co.	19.38	-3.3%	-37.7%	5.61
Nama Chemicals Co.	45.80	4.7%	42.0%	28.07	United Cooperative Assurance Co.	10.48	-2.4%	-69.1%	7.60
Seera Group Holding	20.00	3.7%	15.9%	137.28	Qassim Cement Co.	76.80	-2.3%	1.5%	4.24
Anaam International Holding Group	24.80	3.7%	-69.6%	27.19	Saudi Basic Industries Corp.	96.80	-2.2%	-16.6%	221.71
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.	137.00	137.00	0.0%	16.79	Alkhabeer REIT Fund	7.72	7.72	0.0%	0.70
Nahdi Medical Co.	195.80	195.80	0.0%	35.82	Allied Cooperative Insurance Group	14.64	14.64	0.0%	0.71
Scientific and Medical Equipment House Co.	67.80	67.80	0.0%	9.67	Gulf General Co-op Insurance Co.	8.58	8.58	0.0%	2.98
Elm Co.	345.00	345.00	0.0%	99.57	Gulf Union Alahlia	9.25	9.25	0.0%	0.49
Almunajem Foods Co.	68.00	68.00	0.0%	11.82	National Shipping Co. of Saudi Arabia	28.95	28.95	0.0%	11.85

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum Ltd	128843	4.3%	-24.4%	25,996.00	Aspen Pharmacare Holdings Ltd	2899.00	-2.4%	-87.1%	2741.61
Discovery Holdings	11399.00	3.6%	-20.6%	22456.03	Mr Price Group Ltd	19667.00	-0.01%	-1.4%	16,083.00
Sanlam Ltd	5652.00	3.5%	-4.8%	29164.32					
Old Mutual Limited	1107.00	3.5%	-15.5%	12985.11					
Shoprite Holdings	23174.00	3.3%	10.9%	40322.76					
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)
Absa Group Ltd	18823.00	19536.00	-3.6%	52139.71	Discovery Ltd	11399.00	10915.00	4.4%	22456.03
British American Tobacco PLC	70442.00	73123.00	-3.7%	46810.12	Vodacom Group Ltd	13212.00	12369.00	5.5%	17043.48
Glencore PLC	10037.00	10382.20	-3.3%	44208.80	Old Mutual Ltd	1107.00	1002.00	6.8%	12985.11
Bidvest Group Ltd/The	22300.00	23636.00	-5.7%	18215.76	NEPI Rockcastle PLC	9327.00	8450.00	8.0%	9065.49
Clicks Group Ltd	30723.00	32943.00	-6.7%	21880.92	Growthpoint Properties Ltd	1348.00	1207.00	8.5%	10581.80

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vincom Retail	28750.00	4.6%	-4.5%	53.236,54	Sai Gon Thuong Tin Commercial	23100.00	-2.7%	-26.7%	134.982,40
Mobile World Inv. Corp	74000.00	2.8%	-45.5%	543.544,97	Saigon Securities Inc	21850.00	-1.6%	-57.8%	265.332,00
Vinhomes	61400.00	2.5%	-25.1%	236.539,58	Vietnam Rubber Group JSC	25000.00	-1.4%	-32.3%	36.507,76
Khang Dien House Trading & Investment	35800.00	0.9%	-29.8%	26.466,57	Viet Nam International Commercial Joint Stock Bank	23350.00	-1.1%	-33.4%	35.840,34
Vietnam JSC Bank	27050.00	0.7%	-20.2%	43.527,11	Asia Commercial JS Bank	23750.00	-1.0%	-31.2%	33.260,04
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.	195000.00	197900.00	-1.5%	44.675,41	Vingroup JSC	64000.00	64000.00	0.0%	35.585,84
No Va Land Invest	83900.00	91000.00	-7.8%	237.515,42	Vietjet Aviation	117500.00	116800.00	0.6%	46.153,88
Mobile World Inv. Corp	74000.00	80873.83	-8.5%	543.544,97	Military Commercial Bank	22600.00	21850.00	3.4%	68.527,32
Petrovietnam Gas	113700.00	130442.43	-12.8%	41.752,11	Khang Dien House Trading & Investment	35800.00	33909.09	5.6%	26.466,57
Vinamilk	75300.00	87859.93	-14.3%	104.893,22	Vinhomes	61400.00	57520.56	6.7%	236.539,58

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