

# Daily Market Report

## 14 September 2022

### JSE

JSE All-Share Index fell by 2.15% and closed at 68,273.69 points on Tuesday, as Industrial and Resource sectors recorded losses.

### BRVM

BRVM Composite Index closed at 203.69 points, down marginally by 0.03% on Tuesday, with Sicom Côte d'Ivoire and Ecobank Transnational Inc being the top losers.

### NSE

NGX All-Share Index inched up by 0.004% to close at 49,627.72 points on Tuesday, as the Industrial sectors recorded gains.

### EGX

EGX 30 Index decreased by 0.35% and closed at 10,397.12 points on Tuesday, as the market lost LE 1.61 billion of market cap, amid foreign selling.

### ESG

Casablanca ESG 10 Index was up by 0.13% to close at 906.81 points on Tuesday.

## African Markets

**Nigeria:** NGX 30 Index decreased marginally by 0.02% and closed at 1,770.00 points on Tuesday. FCMB and UBN were the top losers.

**Egypt:** EGX 30 Index decreased by 0.35% and closed at 10,397.12 points on Tuesday, as the market lost LE 1.61 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index was closed on Tuesday on account of Inauguration Day of the President-elect.

**South Africa:** JSE Top 40 Index fell by 2.23% and closed at 61,706.56 points on Tuesday, as Industrial and Resource sectors recorded losses.

## Capital Markets

**JSE** Johannesburg Stock Exchange ▼ 2.15%

**BRVM** Bourse Régionale des Valeurs Mobilières ▼ 0.03%

**NGX** Nigerian Stock Exchange ▲ 0.004%

**EGX** Egyptian Stock Exchange ▼ 0.35%

**ESG** Casablanca Stock Exchange ▲ 0.13%

## Nigeria Key Indicators

	Current
Inflation	19.64%
Exchange Rate	₦ 428.81
<b>INTERBANK RATES</b>	
OPR	7.50 ▼
Overnight	8.00 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.56% and close at 9,986.06 points on Tuesday, as gains in the Utilities, Industrials and Telecommunication sectors led shares higher. MSCI UAE rose by 1.15% to close at 437.86 points.

**Vietnam:** VN-30 Index decreased by 0.24% to close at 1,272.48 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.45% to close at 807.46 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.52% to close at 12,084.45 points on Tuesday, as gains in the Software & Services, Media & Entertainment and Utilities sectors led shares higher. MSCI Saudi Arabia increased by 0.26% to close at 1,675.68 points.

**India:** Nifty 50 Index increased by 0.75% to close at 18,070.05 points on Tuesday, as gains in the Bank, Metal and Financial Services sectors pushed shares higher. MSCI India increased by 0.63% to close at 2,116.56 points.

## News

### Nigeria:

US plans \$12bn for climate action in Nigeria  
PenCom okays Access Bank's pension business acquisition by FBN Holdings  
Nigeria's oil exports plunge below 1mbpd

### Kenya:

Ruto to drop fuel cushion in policy shift against subsidies  
Paid Insurance Claims Jump 5.8% to Ksh 1.8 M in Q2-IRA  
CRB reforms lined up to ease credit cost for small businesses

### Abu Dhabi:

Abu Dhabi's Lyve acquires major stake in Shopini; plans \$150 mn to fuel expansion  
Abu Dhabi's ADQ sells 8.6% stake in TAQA, maintains sizeable ownership  
Abu Dhabi regulator introduces its 'guiding principles' for crypto

### Saudi Arabia:

Saudi Arabia's August oil output hit 11 million barrels a day  
Saudi Arabia closes September issuance of sukuk program at \$453m  
Saudi Aramco launches 'Global AI Corridor' to boost local ecosystem

### Egypt:

FRA approves new amendments to facilitate procedures for listing on EGX  
Egypt's SCZone approves establishment of 4 new logistic projects  
Egypt decides to grant 5-year residency to investors in SCZone

### South Africa:

Libstar revenue rises 9.6%, new CEO named  
TymeBank, Rain boost ARC portfolio value  
SA close to producing plan for Western climate aid, despite hurdles

### India:

India's job market outlook strong for Oct-Dec; 54% companies plan to hire  
Foreign investors snap up Indian bonds set for inclusion in global indexes  
Vedanta, Foxconn sign \$20 billion Gujarat chip deal

### Vietnam:

Banks speed up disbursement of VNĐ40 tm interest subsidy package  
FDI disbursement in eight months posts record high  
Trà Vinh Province sees 30% rise in retail trade and services

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,986.06	0.6%	1.9%	1.1%	17.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,397.12	-0.4%	1.3%	4.0%	-12.7%	EGP/USD	19.36	0.1%	23.2%
India	18,070.05	0.7%	1.3%	1.7%	4.1%	INR/USD	79.15	-0.5%	6.5%
Kenya	1,787.30	0.0%	-0.01%	2.1%	-6.1%	KES/USD	120.71	0.2%	6.7%
Nigeria	1,770.00	-0.02%	-0.1%	-0.4%	2.8%	NGN/USD	435.72	0.1%	5.3%
Saudi Arabia	12,084.45	0.5%	2.1%	-1.6%	6.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	61,706.56	-2.2%	-0.7%	1.6%	-8.0%	ZAR/USD	17.46	1.9%	9.4%
Vietnam	1,272.48	-0.2%	-0.2%	-2.2%	-17.1%	VND/USD	23,557.00	0.2%	3.4%

## MSCI Emerging Markets

MSCI Frontier	523.05	-0.7%	-0.3%	-1.1%	-21.4%	Brent Crude (\$)	93.17	-0.9%	19.8%
MSCI Frontier 100	1,220.53	-0.6%	-0.4%	-0.9%	-20.4%	Gold (\$)	1,717.40	-1.3%	-6.1%
MSCI Emerging	979.91	0.1%	1.0%	-1.4%	-20.5%	Copper (\$)	7,868.50	-1.1%	-19.1%
MSCI World (USD)	2,619.50	-3.7%	-2.4%	-0.3%	-18.9%	Coffee (\$)	204.08	-0.2%	2.8%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	3.41	3.0%	33.7%	8.92	FCMB	3.20	-3.0%	7.4%	3.45
Lafarge Africa	24.60	1.7%	3.8%	16.34	Axamansard	1.78	-1.1%	-20.2%	3.35
Access	8.90	0.6%	-2.2%	52.41	Transnational Corporation	1.07	-0.9%	8.1%	16.99
					UBN	5.95	-0.8%	-1.7%	7.19
					Sterling	1.49	-0.7%	-0.7%	6.24
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%	2.81	Guaranty	19.80	18.00	10.0%	140.13
UACN	11.00	11.00	0.0%	1.11	Cap	17.75	15.25	16.4%	2.22
Transcorp Hotels	6.25	6.25	0.0%	0.03	Nascon	11.00	9.00	22.2%	0.64
Total	234.50	234.50	0.0%	2.26	Stanbic IBTC	30.00	24.50	22.4%	2.71
Seplat Petroleum	1300.00	1300.00	0.0%	4.67	Unilever	13.35	10.50	27.1%	3.04

### 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 Energy	1.37	11.4%	3.8%	64.48	PALMS SPORTS	11.00	-4.2%	-10.0%	7.35
RAK Co. for White Cement & Construction	1.97	5.4%	15.9%	0.03	Ghitha Holding	77.50	-3.3%	181.8%	39.93
Easylease motorcycle rentals	41.00	4.9%	41.4%	15.17	Methaq Takaful Ins.	0.65	-2.3%	-19.8%	0.01
Arkan Building Materials Company	1.17	3.5%	-17.6%	10.26	United Fidelity Ins.	1.60	-1.8%	-60.0%	38.40
Abu Dhabi Ports Company	5.23	3.4%	44.5%	76.01	Al Seer Marine Supplies & Equipment Co	9.80	-1.5%	-29.5%	14.00
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	0.936	0.92	1.74%	2.59
Insurance House	0.85	0.85	0.0%	0.00	National Corp for Tourism & Hotels	2	1.95	2.56%	0.0
National Bank of Fujairah	4.99	4.99	0.0%	0.00	Waha Capital	1.29	1.24	4.03%	0.49
Sharjah Insurance	1.50	1.50	0.0%	0.36	Arkan Building Materials	1.17	1.12	4.46%	10.26
International Holding	360.00	360.00	0.0%	0.00	Emirates Telecom	24.6	23.34	5.40%	49.41

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Cleopatra Hospital Company	4.21	4.0%	-14.4%	44.16	Citadel Capital - Common Shares	1.36	-2.7%	12.5%	30.07
Fawry For Banking Tech And Electronic Payment	4.24	1.4%	-66.9%	106.51	Egyptian Kuwaiti Holding-EGP	23.50	-2.1%	19.6%	8.61
Oriental Weavers	7.00	0.7%	-90.8%	7.49	E-finance For Digital and Financial Investments	15.30	-1.9%	-24.6%	14.62
Housing & Development Bank	37.00	0.5%	-16.0%	0.50	GB AUTO	3.78	-1.6%	-25.9%	10.44
Ibnsina Pharma	1.99	0.5%	-51.1%	3.65	Heliopolis Housing	6.45	-1.2%	-16.0%	0.50
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	108.48	115.00	-5.7%	0.42	Cleopatra Hospital Company	4.21	3.82	10.2%	44.16
Alexandria Mineral Oils Company	4.21	4.48	-6.0%	4.81	Eastern Company	10.51	9.53	10.3%	5.44
Medinet Nasr Housing	3.20	3.42	-6.4%	53.31	Oriental Weavers	7.00	6.30	11.1%	7.49
Alexandria Containers and goods	10.30	11.02	-6.5%	1.19	Commercial International Bank	39.57	33.83	17.0%	180.27
Egyptian Kuwaiti Holding	23.50	25.50	-7.8%	8.61	T M G Holding	7.62	6.50	17.2%	5.98

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finserv	1795.10	4.7%	-89.1%	18709.887	Shree Cement limited	23929.00	-0.9%	-11.3%	3332.48
Tata Consumer products Ltd.	849.00	2.9%	14.2%	2784.82	Cipla	1057.10	-0.7%	12.0%	1211.04
Indusind Bank	1161.60	2.2%	30.8%	4119.26	Eicher Motors	3520.00	-0.5%	35.8%	1872.37
Britannia Inds.	3751.00	2.2%	4.0%	1487.18	Divi's Laboratories Limited	3658.40	-0.5%	-21.8%	1310.70
Bharti Airtel	783.60	1.9%	14.6%	6512.31	Bharat Petroleum	341.00	-0.5%	-11.5%	1772.88
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	333.75	335.00	-0.4%	3507.54	Wipro	422.70	391.00	8.1%	1993.20
State Bank Of India	557.10	560.00	-0.5%	9317.98	Divi's Laboratories Limited	3658.40	3365.55	8.7%	1310.70
Icici Bank	909.20	913.95	-0.5%	9450.60	Hcl Technologies	955.40	877.35	8.9%	2333.27
Bharti Airtel	783.60	788.90	-0.7%	6512.31	Tata Consultancy Svs.	3233.00	2953.00	9.5%	6385.74
SBI Life Insurance	1322.00	1340.35	-1.4%	1535.97	ONGC	133.85	119.85	11.7%	1456.32

## 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	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

\*Market closed on 13/9

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Alujain Holding Corp.	57.20	4.4%	5.9%	61.07	Saudi Arabian Mining Co.	69.10	-3.8%	-12.0%	440.00
Bawan Co.	39.45	4.4%	12.6%	18.50	Saudi Arabian Mining Co.	69.10	-3.8%	75.4%	440.00
Banque Saudi Fransi	49.40	4.2%	4.6%	28.46	Abdullah Al Othaim Markets Co.	123.80	-2.7%	14.4%	18.17
Saudi Industrial Development Co.	15.58	4.0%	-22.9%	30.96	Salama Cooperative Insurance Co.	20.28	-2.2%	19.3%	4.49
Sahara International Petrochemical Co.	48.30	4.0%	15.0%	109.28	Wataniya Insurance Co.	16.56	-2.0%	-59.4%	4.42
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.	138.00	138.00	0.0%	31.80	Alkhabeer REIT Fund	7.71	7.71	0.0%	1.15
Nahdi Medical Co.	202.00	202.00	0.0%	104.68	Allied Cooperative Insurance Group	14.40	14.40	0.0%	0.82
Elm Co.	341.20	341.20	0.0%	67.61	Gulf General Cooperative Insurance Co.	8.59	8.59	0.0%	1.69
Almunajem Foods Co.	68.00	68.00	0.0%	7.75	Gulf Union Alahlia	9.34	9.34	0.0%	0.39
Saudi Tadawul Group Holding Co.	218.60	218.60	0.0%	101.11	National Shipping Co of Saudi Arabia	29.20	29.20	0.0%	19.83

## South Africa

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
					Discovery Holdings	10830.00	-5.0%	-24.6%	27941.40
					Investec Ltd	7824.00	-4.2%	-4.6%	6373.98
					Investec PLC	7925.00	-4.0%	-2.3%	8796.75
					Old Mutual	1063.00	-4.0%	-18.9%	12596.55
					Sasol Ltd	31466.00	-3.9%	21.5%	52548.22
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	70442.00	73123.00	-3.7%	40997.24	Discovery Ltd	10830.00	10915.00	-0.8%	27941.40
Glencore PLC	9911.00	10382.20	-4.5%	35368.54	Vodacom Group Ltd	13055.00	12369.00	5.5%	11777.44
Absa Group Ltd	18569.00	19536.00	-4.9%	54964.24	Old Mutual Ltd	1063.00	1002.00	6.8%	12596.55
Bidvest Group Ltd/The	22300.00	23636.00	-5.7%	22300.00	NEPI Rockcastle PLC	9171.00	8450.00	8.0%	7311.05
Clicks Group Ltd	30242.00	32943.00	-8.2%	23501.03	Growthpoint Properties Ltd	1310.00	1207.00	8.5%	8357.80

\*No gainers on 13/9

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam JSC Bank	27500.00	1.7%	-18.9%	66.136,95	Phat Dat Real Estate Development Corp	51800.00	-3.4%	-45.6%	100.415,68
Ho Chi Minh City Devp	25900.00	1.0%	-16.0%	19.180,09	Saigon Beer Alcohol Beverage Corp.	191000.00	-2.1%	26.5%	31.616,12
Vinamilk	75700.00	0.5%	-12.4%	117.739,74	Vincom Retail	28350.00	-1.4%	-5.8%	54.174,45
Petrovietnam Gas	114200.00	0.4%	18.7%	27.991,13	Vinhomes	60700.00	-1.1%	-26.0%	137.537,99
PetroVietnam Power Corp	14150.00	0.4%	-19.1%	165.617,74	Saigon Securities Inc	21650.00	-0.9%	-58.2%	409.472,61
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.	191000.00	197900.00	-3.5%	31.616,12	Vingroup JSC	64100.00	62400.00	2.7%	67.796,20
No Va Land Invest	83500.00	91000.00	-8.2%	285.799,46	Vietjet Aviation	117400.00	113800.00	3.2%	55.906,94
Mobile World Inv. Corp	74100.00	80873.83	-8.4%	144.711,41	Vinhomes	60700.00	57520.56	5.5%	137.537,99
Petrovietnam Gas	114200.00	130442.43	-12.5%	27.991,13	Khang Dien House Trading & Investment	35800.00	33909.09	5.6%	34.648,83
FPT Corp	84600.00	97944.43	-13.6%	88.770,26	Phat Dat Real Estate Development Corp	51800.00	48200.00	7.5%	100.415,68

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