

Daily Market Report

21 September 2022

JSE

JSE All-Share Index increased by 0.19% and closed at 66,602.84 points on Tuesday, as Financial and Industrial sectors recorded gains.

BRVM

BRVM Composite Index decreased by 0.23% and closed at 208.18 points on Tuesday, with Bank of Africa – Niger and Sode Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index inched up by 0.01% to close at 49,445.31 points on Tuesday, as the Banking and Insurance sectors recorded gains.

EGX

EGX 30 Index jumped by 1.59% and closed at 10,010.53 points on Tuesday, as the market added about LE 6.1 billion to the market cap, amid Egyptian and foreign purchases.

ESG

Casablanca ESG 10 Index increased by 0.31% to close at 910.53 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.19%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.23%
NGX Nigerian Stock Exchange	▲ 0.01%
EGX Egyptian Stock Exchange	▲ 1.59%
ESG Casablanca Stock Exchange	▲ 0.31%

African Markets

Nigeria: NGX 30 Index marginally increased by 0.04% and closed at 1,762.77 points on Tuesday. FBNH and Fidelity were the top gainers.

Egypt: EGX 30 Index jumped by 1.59% and closed at 10,010.53 points on Tuesday, as the market added about LE 6.1 billion to the market cap, amid Egyptian and foreign purchases.

Kenya: NSE 20 Index decreased by 0.29% and closed at 1,748.95 points on Tuesday. Nation Media Group and Total Kenya were the top losers.

South Africa: JSE Top 40 Index increased by 0.25% and closed at 60,119.49 points on Tuesday, as Financial and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	20.52%
Exchange Rate	₦ 430.37
INTERBANK RATES	
OPR	11.00 ▲
Overnight	11.25 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.39% and close at 10135.47 points on Tuesday, as gains in the Telecommunications, Utilities and Energy sectors pushed shares higher. MSCI UAE increased by 0.45% to close at 444.41 points.

Vietnam: VN-30 Index increased by 0.91% to close at 1,241.07 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.19% to close at 791.63 points.

Saudi Arabia: Tadawul All Share Index increased by 0.50% to close at 11,503.60 points on Tuesday, as gains in the Software & Services, Utilities and Media and Entertainment sectors pushed shares higher. MSCI Saudi Arabia increased by 0.35% to close at 1,588.63 points.

India: Nifty 50 Index increased by 1.10% to close at 17,816.25 points on Tuesday, as gains in the Bank, Media and Auto sectors pushed shares higher. MSCI India climbed by 1.13% to close at 2,081.72 points.

News

Nigeria:

Manufacturers spend ₦639bn on power, self-generate over 14,000MW
Shareholders Approve Holding Company Structure for Sterling Bank
Buhari seeks Senate approval for ₦402bn promissory notes

Kenya:

KCB Injects Ksh 120 bn in Oil Marketing
Cos as Govt Phases out Fuel Subsidies
Fuel subsidy cost Sh81bn by June, official data shows
Treasury Awaits KES 3.55 Billion for Fertilizer Subsidy

Abu Dhabi:

Abu Dhabi's Mubadala Energy makes new gas discovery in Malaysia
Dubai Investments launches new mixed-use beachfront project in RAK
IHC makes offer for 25-31.25% stake in Colombia's \$4b food giant Grupo Nutresa

Saudi Arabia:

Saudi holdings of US Treasuries rise by \$2.4bn in July
Oil prices drop in advance of expected Fed rate hike
Essar to invest \$4 bn in steel plant in Saudi Arabia in 3 years: Official

Egypt:

Egypt's FRA approves establishment of fund to invest in Egyptian stocks
FRA approves issuance of LE2B sharia-compliant speculative sukuk
CBE approves procedures facilitating import/export transactions

South Africa:

SA to sign wind power projects to help ease load shedding
Isipa welcomes Openserve separation from the remainder of the Telkom Group
Growth prospects hindered as red tape intensifies energy crisis

India:

Adani pledges entire Ambuja, ACC stakes worth ₹96,800 crore
KKR, Hero to invest \$450 million in green energy business
EPFO adds 18.23 lakh subscribers in July

Vietnam:

Việt Nam, Italy look to optimise business opportunities
Vietnam tightens bond purchase after Tan Hoang Minh fraud
PV Power's revenue up 3 per cent in August

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,135.47	0.4%	-0.6%	2.6%	19.4%	AED/USD	3.67	0.0%	0.0%
Egypt	10,010.53	1.6%	-0.7%	0.1%	-15.9%	EGP/USD	19.42	0.0%	23.6%
India	17,816.25	1.1%	1.6%	0.3%	2.7%	INR/USD	79.76	0.0%	7.3%
Kenya	1,748.95	-0.3%	0.1%	-0.1%	-8.1%	KES/USD	120.51	0.0%	6.5%
Nigeria	1,762.77	0.04%	-0.1%	-0.8%	2.3%	NGN/USD	435.28	-0.1%	5.2%
Saudi Arabia	11,503.60	0.5%	-2.8%	-6.3%	1.5%	SAR/USD	3.76	0.0%	0.1%
South Africa	60,119.49	0.3%	0.2%	-1.0%	-10.3%	ZAR/USD	17.75	0.4%	11.2%
Vietnam	1,241.07	0.9%	-0.9%	-4.6%	-19.2%	VND/USD	23,668.00	0.0%	3.9%

MSCI Emerging Markets

MSCI Frontier	511.16	0.3%	-0.7%	-3.3%	-23.2%	Brent Crude (\$)	90.62	-1.5%	16.5%
MSCI Frontier 100	1,185.60	0.2%	-0.8%	-3.7%	-22.7%	Gold (\$)	1,671.10	-0.4%	-8.6%
MSCI Emerging	946.17	0.8%	0.2%	-4.8%	-23.2%	Copper (\$)	7,758.00	0.1%	-20.2%
MSCI World (USD)	2,554.02	-1.0%	-0.6%	-2.8%	-21.0%	Coffee (\$)	198.60	0.8%	0.02%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	10.50	5.0%	-8.7%	208.92	Total	211.10	-10.0%	-4.9%	61.91
Fidelity	3.48	2.1%	36.5%	17.46	United Capital PLC	11.50	-3.4%	16.2%	8.88
Transnational Corporation	1.06	1.0%	7.1%	3.57	Guaranty	19.55	-0.5%	-24.8%	693.69
Zenith	19.80	0.3%	-20.8%	219.15	MTNN	199.90	-0.05%	9.8%	860.43

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	3.46	3.46	0.0%	0.29	Guaranty	19.55	18.00	8.6%	693.69
Transcorp Hotels	6.25	6.25	0.0%	0.04	Cap	17.75	15.25	16.4%	0.85
Total	211.10	211.10	0.0%	61.91	Stanbic IBTC	29.50	24.50	20.4%	5.79
Seplat Petroleum	1250.00	1250.00	0.0%	0.69	Nascon	11.00	9.00	22.2%	0.47
P Z Cussons	9.25	9.25	0.0%	0.81	UBN	5.75	4.65	23.7%	0.47

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.	24.30	6.9%	15.2%	0.00	ADC Acquisition Corporation PJSC Warrants	1.55	-8.8%	106.7%	0.11
Abu Dhabi National Energy	2.13	5.5%	61.4%	245.35	National Marine Dredging	24.50	-5.0%	87.9%	18.43
Umm Al Qaiwain General Investment Co	1.22	5.2%	6.1%	0.00	ARAM GROUP	3.10	-4.9%	0.0%	0.01
Dana Gas PJSC	1.02	3.7%	-3.8%	27.03	Sudatel Telecom	0.34	-4.5%	-2.3%	0.04
Esg Emirates Stallions Group P.J.S.C	5.98	3.1%	-25.3%	11.94	PALMS SPORTS	10.20	-2.9%	-16.5%	10.44
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	Du	5.95	5.67	4.9%	4.26
Sharjah Insurance	1.50	1.50	0.0%	0.00	Insurance House	0.85	0.81	5.2%	0.00
Finance House	2.12	2.12	0.0%	0.00	Sawaeed Holding	7.05	6.70	5.2%	0.00
Abu Dhabi National Takaful	6.88	6.88	0.0%	0.00	Fujairah Cement Industries	0.43	0.41	6.7%	0.00
Abu Dhabi National Energy	2.13	2.15	-0.9%	249.75	Emirates Insurance Co.	7.00	6.50	7.7%	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	3.93	6.2%	-43.3%	60.32	Eastern Company	9.95	-1.3%	-7.2%	7.37
ELSWEDY ELECTRIC	7.58	5.1%	-22.9%	16.46	Ibnsina Pharma	1.86	-1.2%	-46.7%	1.99
Medinet Nasr Housing	3.05	4.5%	34.2%	56.38	Alexandria Containers and goods	9.54	-0.8%	13.6%	0.95
GB AUTO	3.55	3.5%	-30.4%	11.70	Citadel Capital - Common Shares	1.22	-0.2%	1.2%	10.53
Commercial International Bank	39.02	2.2%	-26.4%	84.65	Credit Agricole	6.41	-0.2%	-23.9%	0.76
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£)
Tenth Of Ramadan Pharma Industries & Diagnostic	2.85	2.96	-3.7%	45.23	Eastern Company	9.95	9.53	4.4%	7.37
Misr Fertilizers Production Company - Mopco	107.00	115.00	-7.0%	4.80	Cleopatra Hospital Company	4.00	3.82	4.7%	4.95
Alexandria Mineral Oils Co.	4.07	4.48	-9.2%	2.99	Oriental Weavers	6.66	6.30	5.7%	3.09
Medinet Nasr Housing	3.05	3.42	-10.8%	56.38	T M G Holding	7.44	6.50	14.5%	10.78
Alexandria Containers and goods	9.54	11.02	-13.4%	0.95	Commercial International Bank	39.02	33.83	15.3%	84.65

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Apollo Hospitals Enterprise Ltd	4556.00	5.8%	-9.3%	5292.982	Shree Cement limited	23180.10	-0.9%	-14.1%	1382.03
Cipla	1093.55	5.5%	15.8%	2682.91	Grasim Industries	1735.20	-0.8%	7.0%	1776.09
Sun Pharma Industries	911.30	4.2%	7.8%	3968.34	Nestle India Limited	18622.35	-0.8%	-5.5%	1569.47
Eicher Motors	3720.00	3.6%	43.5%	3156.98	Power Grid Corp Of India	232.50	-0.3%	13.7%	3545.86
Dr Reddys Lab	4217.30	2.9%	-14.1%	2477.52	Coal India	229.35	-0.2%	57.0%	1590.02
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	3720.00	3738.25	-0.5%	3156.98	Infosys	1388.00	1367.15	1.5%	10105.84
State Bank Of India	573.60	578.50	-0.8%	4882.47	Tata Consultancy Svs.	3033.00	2953.00	2.7%	4724.96
Bharti Airtel	790.00	796.95	-0.9%	6291.99	Wipro	405.00	391.00	3.6%	1827.72
Indusind Bank	1259.75	1275.80	-1.3%	7223.57	Hcl Technologies	913.35	877.35	4.1%	1682.93
ITC	335.25	339.60	-1.3%	3215.05	Divi's Laboratories Limited	3628.05	3365.55	7.8%	1160.41

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	53.00	5.5%	-29.3%	0.03	Nation Media Group	16.80	-7.2%	8.7%	0.54
Safaricom Plc	27.55	2.8%	-19.6%	147.44	Total Kenya Ltd	22.70	-4.2%	-5.4%	0.63
Bamburi Cement Limited	34.00	2.6%	-10.2%	0.10	WPP Scangroup Plc	3.50	-3.8%	-41.7%	0.21
Centum Investment Company Plc	9.62	2.3%	-40.1%	2.41	Kenya Power & Lighting Limited	1.91	-2.6%	11.7%	2.36
British American Tobacco Kenya Ltd	450.00	1.8%	24.7%	0.23	Nairobi Securities Exchange Plc	7.58	-2.3%	-7.1%	0.06
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	31.00	33.45	-6.8%	49.87	Kenya Reinsurance Corporation Ltd	2.04	1.92	6.3%	0.06
Standard Chartered Bank Kenya Ltd	138.25	148.75	-7.1%	0.40	Kengen Limited	3.61	3.35	7.8%	1.08
Stanbic Holdings	97.75	108.00	-9.5%	0.03	Nation Media Group	16.80	15.40	9.1%	0.54
Absa Bank Kenya	11.60	12.95	-10.4%	2.19	Total Kenya Ltd	22.70	20.65	9.9%	0.63
British American Tobacco Kenya Ltd	450.00	512.00	-12.1%	0.23	Bamburi Cement Limited	34.00	30.85	10.2%	0.10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Dallah Healthcare Co.	138.00	7.3%	83.8%	31.07	SABB Takaful Co.	12.66	-4.5%	-53.6%	6.23
Bupa Arabia for Cooperative Insurance Co.	171.20	7.0%	30.3%	25.56	Salama Cooperative Insurance Co.	17.10	-4.2%	0.6%	5.74
Naseej International Trading Co	49.05	6.6%	71.5%	46.71	CHUBB Arabia Co-op Insurance Co.	17.26	-3.6%	-52.8%	7.75
National Medical Care Co.	65.30	6.4%	4.3%	40.64	Tihama Advertising and Public Relations Co.	102.20	-3.6%	170.7%	29.14
Al Hammadi Company for Development and Investment	46.00	4.3%	14.1%	42.86	Fawaz Abdulaziz Alhokair Co.	17.88	-3.5%	14.9%	9.17
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.	135.60	135.60	0.0%	7.41	Al Mashaar REIT	6.60	6.60	0.0%	1.80
Nahdi Medical Co.	202.00	202.00	0.0%	63.28	Al Yamamah Steel Industries Co.	27.40	27.40	0.0%	17.67
Elm Co.	313.80	313.80	0.0%	118.21	Saudi Industrial Investment Group	22.44	22.44	0.0%	44.23
Saudi Tadawul Group Holding Co.	203.40	203.40	0.0%	92.75	Saudi Kayan Petrochemical Co.	12.86	12.86	0.0%	65.46
ACWA POWER Co.	153.80	153.80	0.0%	80.37	Savola Group	30.50	30.50	0.0%	15.85

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Discovery Ltd	10945.00	2.4%	-23.8%	22535.91	Mondi PLC	28771.00	-2.1%	-27.2%	23847.48
Absa Group Ltd	12626.00	2.0%	20.2%	98011.99	Gold Fields Ltd	13248.00	-2.0%	-23.9%	26522.52
Remgro Ltd	13355.00	1.9%	1.8%	16368.13	AngloGold Ashanti Ltd	22429.00	-2.0%	-31.8%	18556.70
Investec Ltd	7850.00	1.3%	-4.3%	11919.02	Glencore PLC	9697.00	-1.7%	21.9%	24348.93
Anglo American Platinum Ltd	124050.00	1.3%	-27.2%	25469.33	Old Mutual Ltd	1043.00	-1.5%	-20.4%	13070.69
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	70516.00	73123.00	-3.6%	30118.86	Vodacom Group Ltd	12626.00	12369.00	2.1%	15468.47
Woolworths Holdings Ltd/South Africa	6311.00	6553.00	-3.7%	31529.19	AngloGold Ashanti Ltd	22429.00	21885.00	2.5%	18556.70
Exxaro Resources Ltd	22826.00	23998.00	-4.9%	11684.26	Old Mutual Ltd	1043.00	1002.00	4.1%	13070.69
Absa Group Ltd	18343.00	19536.00	-6.1%	98011.99	Discovery Ltd	10945.00	10369.00	5.6%	22535.91
Bidvest Group Ltd/The	22113.00	23636.00	-6.4%	25729.82	MultiChoice Group	11535.00	10925.00	5.6%	13109.57

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	20700.00	4.0%	-55.0%	292815.99	Khang Dien House Trading & Investment	33400.00	-0.7%	-28.0%	34174.88
Bank for Inv. and Devp	35150.00	2.8%	-5.3%	39248.49	No Va Land Invest	84600.00	-0.5%	-7.0%	272369.70
Sai Gon Thuong Tin Commercial	22150.00	2.5%	-29.7%	141060.06	Vincom Retail	29050.00	-0.2%	-3.5%	43014.34
BaoViet Holdings	54400.00	2.4%	-2.9%	57664.00					
Vietnam JSC Bank	26000.00	2.0%	-23.3%	52031.20					
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.	187500.00	197900.00	-5.3%	15337.50	Khang Dien House Trading & Investment	33400.00	32900.00	1.5%	34174.88
No Va Land Invest	84600.00	91000.00	-7.0%	272369.70	Vietjet Aviation	116100.00	113800.00	2.0%	37674.45
Mobile World Inv. Corp	71700.00	80873.83	-11.3%	242410.53	Vinhomes	58900.00	57520.56	2.4%	90670.66
Vinamilk	75800.00	87859.93	-13.7%	86389.26	Vietnam National Petroleum Group	38000.00	37050.00	2.6%	50376.60
FPT Corp	83400.00	97944.43	-14.8%	47955.00	Tien Phong Commercial Joint Stock Bank	25400.00	24700.00	2.8%	22621.24

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