

Daily Market Report

26 September 2022

JSE

JSE All-Share Index fell by 2.85% and closed at 63,416.66 points on Friday, as Resources and Financial sectors recorded losses.

BRVM

BRVM Composite Index decreased by 0.18% and closed at 206.84 points on Friday, with CFAO Motors Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index decreased by 0.33% to close at 49,026.62 points on Friday, as the Insurance, Oil & Gas and Industrials sectors recorded losses.

EGX

EGX 30 Index decreased by 0.38% and closed at 9,895.04 points on Sunday, as the market lost LE 128.85 million of the market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.31% to close at 917.54 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.85%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.18%
NGX Nigerian Stock Exchange	▼ 0.33%
EGX Egyptian Stock Exchange	▼ 0.38%
ESG Casablanca Stock Exchange	▲ 0.31%

African Markets

Nigeria: NGX 30 Index decreased by 0.37% and closed at 1,746.22 points on Friday. BUA Cement and Stanbic IBTC were the top losers.

Egypt: EGX 30 Index decreased by 0.38% and closed at 9,895.04 points on Sunday, as the market lost LE 128.85 million of the market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.46% and closed at 1,746.03 points on Friday. NCBA Group and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index fell by 2.96% and closed at 57,109.52 points on Friday, as Resources and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	20.52%
Exchange Rate	₦ 431.09
INTERBANK RATES	
OPR	14.83 ▲
Overnight	15.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.67% and close at 10,025.68 points on Friday, as losses in the Telecommunication, Real Estate and Financial sectors pushed shares lower. MSCI UAE declined by 1.25% to close at 431.96 points.

Vietnam: VN-30 Index declined by 1.10% to close at 1,215.41 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam declined by 1.14% to close at 777.03 points.

Saudi Arabia: Tadawul All Share Index fell by 2.61% to close at 11,161.38 points on Sunday, as losses in the Capital Goods, Consumer Durables & Apparel and Pharma sectors pushed shares lower. MSCI Saudi Arabia fell by 2.43% to close at 1,549.57 points.

India: Nifty 50 Index dropped by 1.72% to close at 17,327.35 points on Friday, as losses in the Bank, Financial Services and Auto sectors pushed shares lower. MSCI India dropped by 1.72% to close at 2,028.21 points.

News

Nigeria:

Govt eyes N298tn five-year private sector investment
NNPC's Subsidy Deduction Climbs to N2.6tn in Eight Months
FG, states, LGs share N673.137bn for August

Kenya:

NSSF interest on savings hits seven-year high as income triples
Bank costs fall on digitisation and higher interest income
Kenya starts cashing in on Africa free trade

Abu Dhabi:

UAE, US sign MoU to lower trade barriers and promote economic growth
UAE signs energy agreement with Germany, to supply LNG
Adnoc and Taqa conclude \$3.8bn clean energy and decarbonisation deal

Saudi Arabia:

Saudi Arabia launches 5 renewable projects to produce 3,300 MW energy
MOMRA signs agreement >\$10bln to develop infrastructure of 11 cities
Total assets of Saudi Arabia's banking sector over \$930bln at end of 2Q22

Egypt:

Egypt targets \$6B through selling stakes in state-owned cos before mid-2023
Exports of chemicals sector up to \$ 5.714B in 8 months
Egypt's renewable energy approach \$3.5 bn to produce 3570 mw

South Africa:

Investec Property Fund expects to deliver on earnings guidance
Remgro to sell stake in TotalEnergies SA
Goldman Sachs positive on the outlook for SA's finances

India:

India's non-petroleum exports to UAE grew 14%
Nestle to invest Rs 5,000 crore in India till 2025, says Global CEO Mark Schneider
RBI may hike rates by 50bps at this week's policy meet

Vietnam:

Vietnam to cut fuel taxes to curb inflation
Vietnam-Switzerland trade surpasses 1.3 billion USD in seven months
Vingroup to build \$255-mln battery plant

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,025.68	-0.7%	0.0%	1.5%	18.1%	AED/USD	3.67	0.0%	0.0%
Egypt	9,895.04	-0.4%	-0.4%	-1.0%	-16.9%	EGP/USD	19.49	0.0%	24.0%
India	17,327.35	-1.7%	0.0%	-2.4%	-0.2%	INR/USD	80.99	0.1%	9.0%
Kenya	1,746.03	0.5%	0.0%	-0.3%	-8.2%	KES/USD	120.60	0.0%	6.6%
Nigeria	1,746.22	-0.4%	0.0%	-1.7%	1.4%	NGN/USD	435.58	0.0%	5.3%
Saudi Arabia	11,161.38	-2.6%	-2.6%	-9.1%	-1.5%	SAR/USD	3.76	0.0%	0.1%
South Africa	57,109.52	-3.0%	0.0%	-6.0%	-14.8%	ZAR/USD	17.95	2.0%	12.5%
Vietnam	1,215.41	-1.1%	0.0%	-6.6%	-20.9%	VND/USD	23,702.00	0.0%	4.0%

MSCI Emerging Markets

MSCI Frontier	497.67	-1.2%	0.0%	-5.9%	-25.2%	Brent Crude (\$)	86.15	-4.8%	10.8%
MSCI Frontier 100	1,157.75	-1.0%	0.0%	-6.0%	-24.5%	Gold (\$)	1655.60	-1.5%	9.5%
MSCI Emerging	905.84	-1.8%	0.0%	-8.9%	-26.5%	Copper (\$)	7433.00	-3.2%	-23.5%
MSCI World (USD)	2,438.50	-2.0%	0.0%	-7.2%	-24.5%	Coffee (\$)	196.88	0.6%	-0.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Access	8.80	6.0%	-3.3%	34.70	BUA Cement	47.85	-4.5%	-28.6%	469.79
Fidelity	3.78	3.0%	48.2%	25.85	Stanbic IBTC	29.00	-3.3%	-19.4%	5.17
UBA	7.30	1.4%	-8.8%	32.53	Guaranty	18.50	-3.1%	-28.8%	82.93
International Breweries	5.10	1.0%	8.5%	4.81	Sterling	1.49	-0.7%	-0.7%	4.28
Cadbury	11.85	0.9%	34.7%	9.99	Zenith	19.95	-0.3%	-20.2%	416.75
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%	0.23	Guaranty	18.50	18.00	2.8%	82.93
Transcorp Hotels	6.25	6.25	0.0%	0.00	Cap	17.75	15.25	16.4%	0.05
Total	211.10	211.10	0.0%	10.91	Stanbic IBTC	29.00	24.50	18.4%	5.17
Seplat Petroleum	1250.00	1250.00	0.0%	71.37	Nascon	11.00	9.00	22.2%	1.78
P Z Cussons	9.25	9.25	0.0%	1.54	UBN	5.75	4.65	23.7%	0.61

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Hayah Insurance Company	0.83	15.0%	27.4%	4.15	Invictus Investment Co	4.10	-7.0%	1.7%	39.47
Gulf Cement	0.51	9.9%	-27.1%	0.00	RAK Co. for White Cement & Construction	1.87	-5.6%	10.0%	0.04
FERTIGLOBE PLC	5.98	4.7%	69.9%	116.37	Apex Investment	4.66	-3.9%	-30.4%	14.38
Methaq Takaful Ins.	0.66	3.1%	-18.5%	0.75	Arkan Building Materials Co	1.30	-3.0%	-8.5%	11.65
Emirates Driving Co.	22.50	2.8%	6.6%	0.77	Abu Dhabi National Energy	2.30	-3.0%	74.2%	78.19
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%	0.00
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	Emirates Telecom	24.80	23.34	6.3%	0.00
International Holding	358.50	370.00	-3.1%	0.00	First Abu Dhabi Bank	18.30	17.16	6.6%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Abou Kir Fertilizers	24.40	3.4%	13.5%	38.84	GB AUTO	3.28	-3.2%	-35.7%	10.83
Egyptian Kuwaiti Holding	22.30	3.0%	13.5%	1.89	Credit Agricole Egypt	6.20	-3.1%	-26.4%	4.91
Eastern Company	10.25	2.0%	-4.4%	5.82	Medinet Nasr Housing	2.64	-2.6%	16.2%	43.63
Egyptian Financial Group-HermesHolding Company	12.20	1.1%	-1.1%	11.83	Commercial International Bank	25.64	-2.1%	-27.2%	96.14
Cairo For Investment And Real Estate Development	11.85	0.4%	-12.9%	2.61	Ezz Steel	13.38	-2.1%	-10.7%	4.18
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	106.79	115.00	-7.1%	0.12	Cleopatra Hospital Company	3.97	3.82	3.9%	0.79
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.72	2.96	-8.1%	0.34	Oriental Weavers	6.66	6.30	5.7%	1.67
Alexandria Mineral Oils Company	4.10	4.48	-8.5%	11.03	Eastern Company	10.25	9.53	7.6%	5.82
Alexandria Containers and goods	9.91	11.02	-10.1%	0.46	Commercial International Bank	25.64	22.49	14.0%	96.14
Egyptian Kuwaiti Holding	22.30	25.50	-12.5%	1.89	T M G Holding	7.46	6.50	14.8%	5.31

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	3650.00	2.0%	-22.0%	2786.061	Power Grid Corp Of India	202.35	-8.1%	-1.0%	13424.80
Sun Pharma Industries	919.05	1.2%	8.7%	4412.53	Hindalco Industries	395.50	-4.0%	-16.8%	3705.29
Cipla	1071.50	0.9%	13.5%	3515.58	Apollo Hospitals Enterprise Ltd	4424.00	-4.0%	-12.0%	5506.12
Tata Steel	104.40	0.8%	-90.6%	11541.84	Adani Ports And Sez.	912.70	-3.6%	25.0%	6158.62
ITC	347.00	0.6%	59.1%	7916.39	NTPC	163.55	-3.0%	31.5%	2028.65
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Maruti Suzuki India	9320.00	9451.00	-1.4%	5367.36	Infosys	1367.95	1360.00	0.6%	14356.98
Eicher Motors	3683.00	3787.25	-2.8%	1617.77	Wipro	394.20	391.00	0.8%	2768.69
Cipla	1071.50	1101.85	-2.8%	3515.58	Tata Consultancy Svs.	2986.65	2953.00	1.1%	7960.01
Titan Company	2681.80	2768.00	-3.1%	3319.43	Hcl Technologies	896.00	877.35	2.1%	2314.52
Bharti Airtel	771.00	797.00	-3.3%	7197.16	Bharat Petroleum	311.85	293.35	6.3%	862.27

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	33.00	9.3%	31.0%	402.73	Nairobi Securities Exchange Plc	7.02	-6.4%	-6.6%	7.74
Nation Media Group	17.75	3.2%	-3.8%	0.04	East African Breweries Limited	141.25	-2.6%	-14.4%	11.33
Stanbic Holdings	100.00	2.3%	14.6%	45.57	WPP Scangroup Plc	3.40	-1.2%	-17.9%	0.06
British American Tobacco Kenya Ltd	449.50	1.7%	1.8%	0.76	Kenya Power & Lighting Limited	1.88	-1.1%	7.4%	1.29
Kengen Limited	3.67	1.7%	-12.4%	2.23	Equity Group Holdings Plc	47.10	-0.9%	-10.7%	152.29
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	33.00	33.25	-0.8%	402.73	Diamond Trust Bank Limited	49.80	48.00	3.7%	0.08
Standard Chartered Bank Kenya Ltd	137.75	148.75	-7.4%	0.54	Kenya Reinsurance Corporation Ltd	2.07	1.92	7.8%	0.01
Stanbic Holdings	100.00	108.00	-7.4%	45.57	Nairobi Securities Exchange Plc	7.02	6.48	8.3%	7.74
Total Kenya Ltd	24.00	26.40	-9.1%	0.09	Kengen Limited	3.67	3.35	9.6%	2.23
Absa Bank Kenya	11.45	12.95	-11.6%	0.38	Bamburi Cement Limited	34.05	30.85	10.4%	0.53

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Hail Cement Co.	13.20	8.0%	-0.6%	37.08	Alinma Tokio Marine	18.18	-8.9%	-42.1%	7.36
Dallah Healthcare Co.	139.40	3.3%	85.6%	25.94	Saudi Printing and Packaging Co.	16.00	-8.5%	-27.1%	4.93
National Medical Care Co.	70.00	2.6%	11.8%	59.00	United Cooperative Assurance Co.	8.68	-7.7%	-74.4%	14.63
Saudi Steel Pipe Co.	21.00	2.4%	-16.7%	5.58	Jazan Energy and Development Co.	13.12	-7.2%	-31.8%	11.17
National Gas and Industrialization Co.	51.20	2.2%	-5.5%	34.44	Arabia Insurance Cooperative Co.	12.42	-7.2%	-68.6%	6.27
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.	135.80	135.80	0.0%	19.09	Abdulmohsen Alhokair Group for Tourism and Development	9.84	9.84	0.0%	3.02
Nahdi Medical Co.	185.00	185.00	0.0%	21.35	Al Kathiri Holding	42.90	42.90	0.0%	3.10
Elm Co.	301.20	301.20	0.0%	58.31	Alkhabeer REIT Fund	7.52	7.52	0.0%	3.34
Saudi Tadawul Group Holding Co.	194.20	194.20	0.0%	65.61	Allied Cooperative Insurance Group	12.68	12.68	0.0%	0.54
ACWA POWER Co.	148.00	148.00	0.0%	44.18	Anaam International Holding Group	18.92	18.92	0.0%	13.64

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MultiChoice Group	11730.00	1.8%	-3.9%	23319.98	Impala Platinum Holdings Ltd	16200.00	-8.1%	-28.0%	46852.67
Aspen Pharmacare Holdings	12469.00	0.6%	-38.3%	17673.51	Sibanye Stillwater	3574.00	-7.6%	-27.2%	47654.95
					Anglo American PLC	52168.00	-7.4%	-19.1%	75205.44
					Glencore PLC	9048.00	-7.1%	13.8%	35830.06
					Anglo American Platinum Ltd	113890.00	-7.0%	-33.2%	17318.46
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)
Woolworths Holdings Ltd	6293.00	6553.00	-4.0%	36824.66	AngloGold Ashanti	21335.00	21335.00	0.0%	35365.56
Absa Group Ltd	17947.00	19536.00	-8.1%	66447.06	Sibanye Stillwater	3574.00	3574.00	0.0%	47654.95
British American Tobacco PLC	66656.00	73123.00	-8.8%	62744.23	Northam Platinum	13900.00	13808.00	0.7%	14460.16
Exxaro Resources Ltd	21821.00	23998.00	-9.1%	19597.00	Old Mutual Ltd	1010.00	1000.00	1.0%	9492.96
Bidvest Group Ltd/The	21236.00	23636.00	-10.2%	21067.77	Capitec Bank Holdings Ltd	163031.00	161148.00	1.2%	87999.41

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
BaoViet Holdings	58400.00	5.8%	4.3%	257287.04	Vietcombank	75900.00	-2.7%	-3.7%	78488.19
Petrovietnam Gas	112500.00	1.4%	20.1%	40691.25	Sai Gon Thuong Tin Commercial	21450.00	-2.3%	-31.9%	149341.34
					Saigon Securities Inc	20650.00	-2.1%	-55.1%	223309.10
					Vietjet Aviation	112800.00	-1.9%	-12.1%	42345.12
					Vietnam Prosperity	28750.00	-1.9%	-19.7%	283109.88
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.	187000.00	197900.00	-5.5%	26217.40	Vietjet Aviation	112800.00	112700.00	0.1%	42345.12
No Va Land Invest	84500.00	91000.00	-7.1%	256558.90	Vietnam National Petroleum Group	37200.00	37000.00	0.5%	65103.72
Vinamilk	76700.00	87004.15	-11.8%	107272.62	Vinhomes	57200.00	56600.00	1.1%	36087.48
Petrovietnam Gas	112500.00	130442.43	-13.8%	40691.25	Tien Phong Commercial Joint Stock Bank	25050.00	24700.00	1.4%	26540.48
Mobile World Inv. Corp	69400.00	80873.83	-14.2%	188601.44	Asia Commercial JS Bank	22600.00	22000.00	2.7%	33122.56

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