

# Daily Market Report

22 June 2023

## JSE

JSE All-Share Index dropped by 1.48% and closed at 75,629.88 points on Wednesday, as the Resources and Industrials sectors recorded losses.

## BRVM

BRVM Composite Index inched up by 0.02% and closed at 197.17 points on Wednesday, with Servair Abidjan Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

## NSE

NGX All-Share Index increased by 0.36% to close at 59,323.95 points on Wednesday, as the Insurance, Oil & Gas, and Industrials sectors recorded gains.

## EGX

EGX 30 Index dropped by 1.20% and closed at 17,706.08 points on Wednesday, as the market lost 14 billion of market cap, amid Arab and foreign selling.

## ESG

Casablanca ESG 10 Index surged by 1.97% to close at 858.27 points on Wednesday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	1.48%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.02%
<b>NGX</b> Nigerian Stock Exchange	▲	0.36%
<b>EGX</b> Egyptian Stock Exchange	▼	1.20%
<b>ESG</b> Casablanca Stock Exchange	▼	1.97%

## African Markets

**Nigeria:** NGX 30 Index increased by 0.44% to close at 2146.40 points on Wednesday. BUA Cement and Custodian were the top gainers.

**Egypt:** EGX 30 Index dropped by 1.20% and closed at 17,706.08 points on Wednesday, as the market lost 14 billion of market cap, amid Arab and foreign selling.

**Kenya:** NSE 20 Index increased by 0.57% and closed at 1,567.39 points on Wednesday. Safaricom Plc and Stanbic Holdings were the top gainers.

**South Africa:** JSE Top 40 Index dropped by 1.54% and closed at 70,240.25 points on Wednesday, as the Resources and Industrials sectors recorded losses.

## Nigeria Key Indicators

	Current
Inflation	22.41%
Exchange Rate (I&E window)	₦ 763.17
<b>INTERBANK RATES</b>	
OPR	11.50 ▼
Overnight	11.90 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.28% to close at 9,490.47 points on Wednesday, as gains in the Financials, Real Estate, and Utilities sectors led shares higher. MSCI UAE increased by 0.55% to close at 392.41 points.

**Vietnam:** VN-30 Index increased by 0.71% to close at 1,112.07 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.86% to close at 654.77 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.30% to close at 11,466.17 points on Wednesday, as gains in the Utilities, Insurance, and Pharma, Biotech & Life Science sectors led shares higher. MSCI Saudi Arabia inched down by 0.30% and closed at 1,511.62 points.

**India:** Nifty 50 Index increased by 0.21% to close at 18,856.85 points on Wednesday, as gains in the Metal, Media, and Auto led shares higher. MSCI India was up by 0.18% to close at 2,119.61 points.

## News

### Nigeria:

NMDPRA approves six firms to import petrol Commodities Exchange to add N15tr to GDP from agric

MTN, Microsoft Partner To Enhance Operations With Cloud Tech

### Kenya:

Kenya to benefit from Sh12.5bn US green energy for Africa funds  
Kenya sees shilling falling to 150 mark against dollar next June  
KCB, Visa partner to roll out tap-and-pay services

### Abu Dhabi:

CBUAE records surge in foreign assets in April, surpassing \$156.2bn  
Dubai launches digital strategy, targets \$27.2bn sector value add  
Abu Dhabi's Taqa to acquire SWS Holding for Dh1.7 billion

### Saudi Arabia:

Riyadh Air signs deal for 90 GEEx engines to power Boeing fleet  
Shell signs deal to operate gas stations in Saudi Arabia  
Saudi EV maker Ceer to contribute \$7.9bn to Kingdom's GDP by 2034

### Egypt:

Cabinet endorses draft on amending some provisions of investment law  
Suez Canal Authority to offer 20% of Canal Mooring & Lights in IPO  
Suez Canal's revenue soars 35% in FY 2022/23

### South Africa:

CPI slows more than expected in May  
R4.5bn minerals beneficiation investment boost for Richards Bay  
FirstRand flags modest recession but says its earnings stayed resilient

### India:

TCS signs \$1.1 billion contract with UK's Nest Eaton India to double capacity at its Puducherry plant  
Reliance Consumer expands FMCG brand 'Independence' to North India

### Vietnam:

HSBC cuts its 2023 inflation forecast to 2.6% from 4.0% previously  
Việt Nam logistics sector offers attractive investment opportunities  
Hanoi's economy sees effective recovery

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,490.47	0.3%	0.5%	0.9%	-7.1%	AED/USD	3.67	0.0%	0.0%
Egypt	17,706.08	-1.2%	-1.0%	1.2%	21.3%	EGP/USD	30.90	0.0%	25.1%
India	18,856.85	0.2%	0.2%	1.7%	4.2%	INR/USD	81.94	-0.1%	-1.0%
Kenya	1,567.39	0.6%	0.2%	1.3%	-6.5%	KES/USD	140.30	0.1%	13.6%
Nigeria	2,146.40	0.4%	0.4%	6.2%	16.5%	NGN/USD	763.17	0.9%	39.5%
Saudi Arabia	11,466.17	0.3%	-0.4%	4.1%	9.4%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,240.25	-1.5%	-3.8%	0.3%	4.9%	ZAR/USD	18.32	-0.3%	7.6%
Vietnam	1,112.07	0.7%	0.3%	4.3%	10.6%	VND/USD	23,510.00	-0.1%	-0.5%

## MSCI Emerging Markets

MSCI Frontier	482.42	0.3%	0.2%	1.2%	2.1%	Brent Crude (\$)	77.12	1.6%	-10.2%
MSCI Frontier 100	1,097.17	0.4%	0.2%	-0.4%	0.6%	Gold (\$)	1,944.90	-0.1%	6.5%
MSCI Emerging	1,004.27	-0.9%	-2.5%	4.8%	5.0%	Copper (\$)	8,602.50	0.6%	2.8%
MSCI World (USD)	2,917.72	-0.7%	-1.5%	4.2%	12.1%	Coffee (\$)	172.62	-1.8%	10.5%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
BUA Cement	90.00	4.7%	-7.9%	63.87	Cadbury	17.10	-9.0%	43.7%	27.84
Custodian	7.10	2.9%	19.3%	6.54	Sterling	2.77	-4.2%	97.9%	61.98
Stanbic IBTC	54.00	2.0%	61.4%	122.08	Wema	4.82	-3.4%	23.6%	9.54
Lafarge Africa	29.10	1.0%	21.3%	65.12	Flour Mills	34.20	-2.1%	20.4%	66.21
United Capital PLC	14.65	1.0%	4.6%	76.58	P Z Cussons	18.90	-2.1%	66.5%	98.77
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	5.00	5.00	0.0%	78.02	Cap	19.20	15.25	25.9%	6.65
Zenith	31.75	31.75	0.0%	471.67	Unilever	15.10	10.50	43.8%	23.07
Wema	4.82	4.82	0.0%	9.54	Custodian	7.10	4.55	56.0%	6.54
UBN	7.45	7.45	0.0%	5.37	UBN	7.45	4.65	60.2%	5.37
UBA	11.45	11.45	0.0%	362.03	Nestle	1250.00	764.90	63.4%	22.76

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement Co.	0.45	14.6%	-14.0%	0.18	Invictus Investment Company PLC	2.70	-1.5%	-29.3%	8.54
United Arab Bank	1.18	5.4%	38.8%	0.05	ESG EMIRATES STALLIONS GROUP	4.78	-1.4%	-38.4%	8.73
Hayah Insurance Company P.J.S.C	1.25	4.2%	28.9%	0.23	Americana Restaurants International PLC	4.15	-1.2%	39.7%	14.91
Aram Group	2.15	2.4%	-3.6%	0.00	Abu Dhabi Aviation	6.50	-1.1%	0.0%	0.72
First Abu Dhabi Bank	13.76	2.1%	-19.5%	77.46	ESHRAQ INVESTMENTS	0.56	-1.1%	15.1%	4.28
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Al Dhafra Insurance Co.	5.40	5.40	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sharjah Insurance Co.	1.49	1.49	0.0%	0.00
United Fidelity Insurance Company (P.S.C)	1.60	1.60	0.0%	0.00	Invest Bank	0.45	0.45	0.0%	0.00

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Abu Dhabi Islamic Bank- Egypt	22.53	1.0%	25.4%	18.88	Ibnsina Pharma	2.41	-4.0%	11.6%	46.26
GB AUTO	6.41	0.9%	19.6%	45.50	Credit Agricole Egypt	14.31	-3.3%	69.1%	2.30
ELSWEDY ELECTRIC	20.50	0.5%	70.8%	54.24	Medinet Nasr Housing	3.44	-2.8%	5.8%	12.09
Edita Food Industries S.A.E	18.40	0.4%	32.5%	3.14	Abou Kir Fertilizers	43.71	-2.8%	12.7%	58.89
Juhayna Food Industries	12.30	0.2%	25.6%	11.86	Heliopolis Housing	11.15	-2.5%	11.6%	46.26
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£)
Telecom Egypt	25.46	25.46	0.0%	26.10	Cleopatra Hospital Co.	4.56	3.81	19.7%	9.90
Sidi Kerir Petrochemicals	21.62	21.62	0.0%	38.22	T M G Holding	9.09	6.50	39.8%	28.54
QALA For Financial Investments	2.78	2.78	0.0%	85.27	Taaleem Management Services	3.90	2.72	43.4%	0.48
Palm Hills Development Company	2.07	2.07	0.0%	41.82	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.43	1.62	50.0%	7.00
Oriental Weavers	14.91	14.91	0.0%	14.27	E-finance For Digital and Financial Investments	17.48	11.25	55.4%	8.73

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Power Grid Corp Of India	258.15	3.8%	20.8%	5961.195	Jsw Steel	758.25	-1.9%	-1.3%	2098.77
Adani Ports And Sez.	752.10	1.9%	-8.1%	6900.74	Hindalco Industries	421.50	-1.7%	-11.0%	2398.82
Hdfc Bank	1636.00	1.8%	0.5%	19790.03	Divi's Laboratories Limited	3515.00	-1.4%	3.0%	2193.42
HDFC	2703.00	1.7%	2.5%	12066.76	Mahindra & Mahindra	1376.50	-1.4%	10.2%	2780.74
Tech Mahindra	1120.05	1.2%	10.2%	2215.26	ITC	448.10	-1.1%	35.2%	2721.57
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Hcl Technologies	1173.00	1175.70	-0.2%	2359.27	Infosys	1298.25	1185.30	9.5%	5255.04
Britannia Inds.	5069.15	5085.25	-0.3%	1380.05	Wipro	385.90	352.00	9.6%	1702.02
Power Grid Corp Of India	258.15	259.05	-0.3%	5961.20	Tata Consultancy Svs.	3255.00	2926.10	11.2%	5345.34
NTPC	187.55	188.70	-0.6%	1107.48	Kotak Mahindra Bank	1843.00	1631.00	13.0%	4422.52
Nestle India Limited	22930.00	23175.25	-1.1%	1477.63	UPL	686.65	607.50	13.0%	818.73

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	16.80	3.4%	-30.4%	42.07	Bamburi Cement Limited	25.50	-1.7%	-19.0%	0.08
Stanbic Holdings	110.00	2.3%	7.8%	1.11	Kengen Limited	2.30	-1.3%	-28.6%	1.45
WPP Scangroup Plc	2.89	1.4%	-4.0%	0.01	Total Kenya Ltd	20.65	-1.2%	-13.4%	0.00
NCBA Group Plc	39.10	1.2%	-0.6%	0.38	Equity Group Holdings Plc	37.85	-0.1%	-14.9%	3.15
Kenya Reinsurance Corporation Ltd	1.83	1.1%	0.0%	0.19					
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	39.10	40.90	-4.4%	0.38	KCB Group Plc	29.45	28.50	3.3%	16.90
Standard Chartered Bank Kenya Ltd	160.25	171.00	-6.3%	4.47	Equity Group Holdings Plc	37.85	35.80	5.7%	3.15
Stanbic Holdings	110.00	117.75	-6.6%	1.11	Nairobi Securities Exchange Plc	5.98	5.62	6.4%	0.14
Absa Bank Kenya	11.75	12.95	-9.3%	3.18	British American Tobacco Kenya Ltd	426.25	400.00	6.6%	0.77
The Cooperative Bank of Kenya Ltd	12.20	14.00	-12.9%	3.20	Kengen Limited	2.30	2.15	7.0%	1.45

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Jamjoom Pharmaceuticals Factory Co.	90.30	15.8%	0.0%	639.98	Saudi Re for Cooperative Reinsurance Co.	18.10	-3.2%	32.1%	15.22
Malath Cooperative Insurance Co.	21.52	9.9%	94.9%	50.01	Buruj Cooperative Insurance Co.	19.52	-3.2%	24.0%	7.04
Thob Al Aseel Co.	5.77	9.9%	-84.7%	13.47	AlSaif Stores for Development and Investment Co.	95.30	-2.5%	4.4%	38.47
Salama Cooperative Insurance Co.	24.50	7.6%	89.0%	23.67	Saudi Arabian Fertilizer Co.	4.07	-2.4%	-87.4%	22.68
National Medical Care Co.	133.00	6.7%	80.0%	49.51	Nayifat Finance Co.	17.32	-2.4%	-8.7%	12.43
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)
Jamjoom Pharmaceuticals Factory Co.	90.30	90.30	0.0%	639.98	Abdullah Al Othaim Markets Co.	13.88	13.88	0.0%	12.35
Al Mawarid Manpower Co.	88.00	88.00	0.0%	154.09	Al Kathiri Holding Co.	3.12	3.12	0.0%	6.59
Saudi Aramco Base Oil Co.	136.00	136.00	0.0%	77.05	Alkhabeer REIT Fund	6.78	6.78	0.0%	1.48
Power & Water Utility Co for Jubail & Yanbu	68.60	68.60	0.0%	80.80	Allied Cooperative Insurance Group	15.86	15.86	0.0%	8.13
Riyadh Cables Group Co.	65.90	65.90	0.0%	9.19	Ash-Sharqiyah Development Co.	21.40	21.40	0.0%	5.19

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
British American Tobacco PLC	60370.00	0.8%	-10.4%	51833.68	Impala Platinum Holdings Ltd	13773.00	-5.9%	-35.4%	53026.05
Capitec Bank Holdings Ltd	155252.00	0.1%	-16.5%	41363.79	Vodacom Group Ltd	11621.00	-4.9%	-5.3%	18709.81
Bid Corp Ltd	41868.00	0.1%	26.9%	22983.44	Anglo American Platinum Ltd	93466.00	-4.8%	-34.4%	38297.69
MTN Group Ltd	13765.00	0.1%	8.1%	53683.50	Sibanye Stillwater Ltd	3054.00	-4.5%	-31.7%	19942.62
Standard Bank Group Ltd	17710.00	0.1%	5.5%	52067.40	Sasol Ltd	24629.00	-3.8%	-8.6%	37682.37
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)
Anheuser-Busch InBev SA/NV	104027.00	104404.00	-0.4%	18952.68	Growthpoint Properties Ltd	1241.00	1233.00	0.6%	7110.93
Aspen Pharmacare Holdings Ltd	18462.00	18672.00	-1.1%	9075.37	Sasol Ltd	24629.00	24445.00	0.8%	37682.37
Reinet Investments SCA	41242.00	41849.00	-1.5%	9089.32	Mondi PLC	28195.00	27954.00	0.9%	27212.12
Remgro Ltd	14618.00	14840.00	-1.5%	16956.88	Nedbank Group Ltd	22995.00	22760.00	1.0%	38171.70
Bid Corp Ltd	41868.00	43300.00	-3.3%	22983.44	Anglo American PLC	54809.00	54460.00	1.2%	60837.99

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group JSC	24600.00	4.0%	36.7%	857.607,33	Vietjet Aviation	94000.00	-1.2%	-14.2%	79.368,74
Vietnam Rubber Group JSC	19500.00	3.7%	41.3%	143.631,94	Vinhomes	54600.00	-0.9%	13.8%	129.773,67
Masan Group Corp	76100.00	1.2%	-18.2%	76.294,45	Petrovietnam Gas	95800.00	-0.7%	-5.6%	46.275,13
Techcombank	32500.00	1.1%	25.7%	80.984,84	Ho Chi Minh City Devp	18650.00	-0.3%	16.9%	30.449,34
Military Commercial Bank	19850.00	1.0%	16.1%	119.320,38	Bank for Inv. and Devp	43400.00	-0.2%	12.4%	35.345,15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietcombank	100000.00	100000.00	0.0%	118.853,87	BaoViet Holdings	44150.00	44150.00	0.0%	29.027,26
FPT Corp	85800.00	97944.43	-12.4%	60.570,81	Mobile World Inv. Corp	42700.00	42700.00	0.0%	109.083,78
Bank for Inv. and Devp	43400.00	49950.00	-13.1%	35.345,15	No Va Land Invest	14500.00	14500.00	0.0%	414.064,46
Sai Gon Thuong Tin Commercial	29400.00	36700.00	-19.9%	495.105,07	Phat Dat Real Estate Development Corp	17300.00	17300.00	0.0%	200.491,64
Saigon Beer Alcohol Beverage Corp.	155000.00	197900.00	-21.7%	21.196,33	Vingroup JSC	52400.00	52400.00	0.0%	107.477,70

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