

# Daily Market Report

3 July 2023

## JSE

JSE All-Share Index climbed by 1.52% and closed at 76,027.83 points on Friday, as the Financial and Real Estate sectors recorded gains.

## BRVM

BRVM Composite Index increased by 0.57% and closed at 199.98 points on Friday, with Bollore Transport & Logistics and Safca Côte d'Ivoire being the top gainers.

## NSE

NGX All-Share Index climbed by 1.43% to close at 60,968.27 points on Friday, as the Banking, Oil & Gas, and Consumer Goods sectors recorded gains.

## EGX

EGX 30 Index was closed on Sunday on account of Eid-al-Adha.

## ESG

Casablanca ESG 10 Index was closed on Friday on account of Eid-al-Adha.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	1.52%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.57%
<b>NGX</b> Nigerian Stock Exchange	▲	1.43%
<b>EGX</b> Egyptian Stock Exchange	↔	0.00%
<b>ESG</b> Casablanca Stock Exchange	↔	0.00%

## African Markets

**Nigeria:** NGX 30 Index jumped by 1.26% to close at 2,201.23 points on Friday. Sterling and Unilever were the top gainers.

**Egypt:** EGX 30 Index was closed on Sunday on account of Eid-al-Adha.

**Kenya:** NSE 20 Index increased by 0.22% and closed at 1,574.92 points on Friday. WPP Scangroup and British American Tobacco Kenya Ltd were the top gainers.

**South Africa:** JSE Top 40 Index climbed by 1.58% and closed at 70,705.47 points on Friday, as the Financials and Real Estate sectors recorded gains.

## Nigeria Key Indicators

	Current
Inflation	22.41%
Exchange Rate (I&E window)	₦ 769.25
<b>INTERBANK RATES</b>	
OPR	1.36 ↔
Overnight	2.00 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX market was closed on Friday on account of Eid-al-Adha.

**Vietnam:** VN-30 Index was down by 0.19% to close at 1,123.13 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.42% to close at 662.56 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.30% to close at 11,493.91 points on Sunday, as gains in the Pharma, Biotech & Life Science, Materials, and Commercial & Professional Svc sectors led shares higher. MSCI Saudi Arabia increased by 0.40% and closed at 1,516.30 points.

**India:** Nifty 50 Index jumped by 1.14% to close at 19,189.05 points on Friday, as gains in the Bank, Media and Metal led shares higher. MSCI India increased by 0.98% to close at 2,143.35 points.

## News

### Nigeria:

W'Bank projects 25% 2023 inflation in Nigeria  
Real estate sector paid N70bn VAT in five years – Report  
Total transactions on NGX grew by 69% in May

### Kenya:

Kenya benchmarks Egypt's 11pc in Eurobond buyback  
Fuel adulteration levy to cross Sh4bn mark  
NMG shareholders approve Sh285m dividend, share buyback

### Abu Dhabi:

UAE startups raise funding to expand to Saudi Arabia  
e& looks at more Europe possibilities after Czech deal  
AD Ports Group completes landmark Noatum acquisition

### Saudi Arabia:

ACWA Power approves 2m share buyback, 8.3% dividend for 2022  
SARIE sees 29% jump in customer payment to \$286bn in May  
Saudi Arabia and Slovenia explore trade ties at WEF event

### Egypt:

WFP approves Egypt's Country Strategic Plan at a value of \$431M  
Egypt's exports to Africa drop by 5% in Q1 of 2023, imports rise by 3%  
Egypt released imports worth \$32 billion in 5 months: gov't

### South Africa:

SA private sector credit up 6.85% y/y in May  
Early signs of sustained improvement at Eskom, says Ramokgopa  
Auto sector wants government to take it more seriously

### India:

World Bank OKs \$1.5bn for India's low carbon energy sector  
GST grows 12% to over Rs 1.61 lakh crore in June  
Core sector growth stable at 4.3%, fiscal deficit 11.8%

### Vietnam:

HCM City's economic growth reaches 3.55% in first half of 2023  
Foreign investment disbursement bounce back in H1  
Retail sales of consumer goods, services up 10.9% in H1

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,550.40	0.0%	0.0%	1.5%	-6.5%	AED/USD	3.67	0.0%	0.0%
Egypt	17,665.29	0.0%	0.0%	1.0%	21.0%	EGP/USD	30.87	-0.1%	25.0%
India	19,189.05	1.1%	0.0%	3.5%	6.0%	INR/USD	82.10	-0.1%	-0.8%
Kenya	1,574.92	0.2%	0.0%	1.8%	-6.0%	KES/USD	138.30	-1.6%	12.0%
Nigeria	2,201.23	1.3%	0.0%	8.9%	19.5%	NGN/USD	769.25	0.8%	40.0%
Saudi Arabia	11,493.91	0.3%	0.3%	4.4%	9.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,705.47	1.6%	0.0%	1.0%	5.6%	ZAR/USD	18.84	0.3%	10.6%
Vietnam	1,123.13	-0.2%	0.0%	5.3%	11.7%	VND/USD	23,585.00	0.1%	-0.2%

## MSCI Emerging Markets

MSCI Frontier	485.70	0.1%	0.0%	1.9%	2.8%	Brent Crude (\$)	74.90	0.8%	-12.8%
MSCI Frontier 100	1,098.59	0.2%	0.0%	-0.2%	0.7%	Gold (\$)	1,929.40	0.6%	5.7%
MSCI Emerging	989.48	0.2%	0.0%	3.2%	3.5%	Copper (\$)	8,315.50	1.7%	-0.7%
MSCI World (USD)	2,966.72	1.1%	0.0%	5.9%	14.0%	Coffee (\$)	161.53	-0.5%	3.4%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
P Z Cussons	22.00	10.0%	93.8%	98.98	FCMB	5.10	-4.5%	32.5%	498.02
Sterling	3.36	9.8%	140.0%	85.32	Lafarge Africa	29.50	-1.3%	22.9%	117.90
UACN	10.80	8.5%	5.4%	39.30	Dangote Cement	285.00	-0.9%	9.2%	170.61
Wema	5.29	5.4%	35.6%	10.26					
Unilever	16.30	5.2%	40.5%	10.74					
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	5.10	5.10	0.0%	498.02	Cap	19.20	15.25	25.9%	8.00
Zenith	34.25	34.25	0.0%	2531.61	Unilever	16.30	10.50	55.2%	10.74
Wema	5.29	5.29	0.0%	10.26	UBN	7.35	4.65	58.1%	1.48
UBN	7.35	7.35	0.0%	1.48	Nestle	1250.00	764.90	63.4%	74.60
UBA	12.25	12.25	0.0%	1113.73	Custodian	7.50	4.55	64.8%	0.09

### Abu Dhabi\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Medical Projects Company	1.93	14.9%	-10.6%	0.06	National Corp for Tourism & Hotels	2.94	-3.0%	-2.0%	0.45
Gulf Cement Co.	0.51	14.2%	-2.3%	0.75	Bayanat AI PLC	4.10	-2.2%	-16.3%	8.63
Aram Group	2.25	12.5%	0.9%	0.00	Arkan Building Materials Company	1.42	-1.4%	-10.7%	5.81
OOREDOO	11.50	8.7%	38.6%	0.00	Abu Dhabi National Oil Co. For Distribution	3.90	-1.3%	-11.6%	32.40
Abu Dhabi National Energy Company	3.53	7.6%	2.9%	312.33	Q.Holding PSC	2.36	-1.3%	-41.0%	12.14
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 Company	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

\*Market closed on 30/6

## Egypt\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Palm Hills Development Company	2.12	5.0%	8.2%	23.06	Misr Fertilizers Production Company	231.70	-2.7%	62.7%	20.88
Medinet Nasr Housing	3.59	4.7%	10.5%	17.85	Edita Food Industries S.A.E	18.30	-1.4%	31.7%	1.69
Abu Dhabi Islamic Bank- Egypt	23.25	4.6%	29.4%	16.34	Orascom Construction	123.00	-0.5%	28.2%	5.49
Commercial International Bank	51.00	4.1%	23.0%	234.77	Juhayna Food Industries	12.29	-0.1%	25.5%	9.11
ELSWEDY ELECTRIC	20.37	3.4%	69.8%	30.06					
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	25.88	25.88	0.0%	23.00	Cleopatra Hospital Co.	4.45	3.81	16.8%	1.53
Sidi Kerir Petrochemicals	22.17	22.17	0.0%	17.57	T M G Holding	9.00	6.50	38.5%	69.74
QALA For Financial Investments	2.91	2.91	0.0%	110.00	Taaleem Management Services	3.86	2.72	41.9%	0.10
Palm Hills Development Co.	2.12	2.12	0.0%	23.06	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.38	1.62	46.9%	7.74
Oriental Weavers	14.85	14.85	0.0%	14.32	E-finance For Digital and Financial Investments	17.06	11.25	51.6%	2.86

\*Market closed on 30/6

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1456.00	4.4%	16.6%	5936.063	Adani Ports And Sez.	739.90	-2.2%	-9.6%	4936.42
Infosys	1337.85	3.4%	-11.3%	17003.23	Grasim Industries	1733.80	-0.5%	0.6%	786.48
Indusind Bank	1376.50	3.2%	12.8%	6277.12	HDFC Life Insurance Company Ltd	648.50	-0.5%	14.5%	5616.77
Sun Pharma Industries	1051.00	2.9%	5.0%	4979.63	Apollo Hospitals Enterprise Ltd	5099.70	-0.5%	13.9%	2092.92
Hero Motocorp	2905.00	2.7%	6.1%	2785.35	Adani Enterprises Limited	2390.00	-0.5%	-38.1%	12254.65
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Mahindra & Mahindra	1456.00	1461.00	-0.3%	5936.06	UPL	687.30	621.95	10.5%	1203.68
Larsen & Toubro	2475.00	2483.50	-0.3%	6601.36	Wipro	389.05	352.00	10.5%	1756.56
Axis Bank	986.10	989.85	-0.4%	6978.12	Tata Consultancy Svs.	3298.40	2926.10	12.7%	8766.48
Dr Reddys Lab	5153.95	5174.95	-0.4%	2503.78	Infosys	1337.85	1185.30	12.9%	17003.23
Titan Company	3055.00	3067.95	-0.4%	2884.17	Kotak Mahindra Bank	1843.00	1631.00	13.0%	7249.17

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	2.89	2.5%	-4.0%	0.00	East African Breweries Limited	155.00	-2.1%	-7.5%	0.17
British American Tobacco Kenya Ltd	432.75	1.8%	-5.9%	0.26	Equity Group Holdings Plc	38.25	-1.3%	-14.0%	42.63
NCBA Group Plc	38.85	1.2%	-1.3%	1.73	Total Kenya Ltd	19.15	-0.8%	-19.7%	0.09
Kenya Reinsurance Corporation Ltd	1.80	1.1%	-1.6%	3.67	Stanbic Holdings	111.25	-0.7%	9.1%	0.10
Kengen Limited	2.31	0.9%	-28.3%	0.15	Kenya Power & Lighting Limited	1.58	-0.6%	1.3%	0.08
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	38.85	40.90	-5.0%	1.73	KCB Group Plc	29.30	28.50	2.8%	24.13
Stanbic Holdings	111.25	117.75	-5.5%	0.10	Total Kenya Ltd	19.15	18.25	4.9%	0.09
Standard Chartered Bank Kenya Ltd	160.50	171.00	-6.1%	1.49	Nairobi Securities Exchange Plc	5.98	5.62	6.4%	9.64
Absa Bank Kenya	11.80	12.95	-8.9%	0.52	Equity Group Holdings Plc	38.25	35.80	6.8%	42.63
The Cooperative Bank of Kenya Ltd	12.20	14.00	-12.9%	1.43	Kengen Limited	2.31	2.15	7.4%	0.15

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
First Milling Co.	80.00	13.5%	100.0%	612.12	Thob Al Aseel Co.	5.31	-8.5%	-86.0%	22.46
Jamjoom Pharmaceuticals Factory Co.	98.40	9.9%	0.0%	171.18	Saudi Chemical Co.	3.61	-4.5%	-86.4%	6.08
Al Mawarid Manpower Co.	104.20	9.8%	888.6%	140.77	Batic Investments and Logistics Co.	2.35	-4.5%	-90.1%	5.31
The Mediterranean and Gulf Insurance and Reinsurance Co.	10.10	8.4%	17.2%	22.85	Middle East Healthcare Co.	67.90	-4.0%	166.8%	48.37
Leejam Sports Co.	137.00	6.2%	63.1%	57.83	Al-Baha Investment and Development Co.	19.00	-3.7%	65.2%	28.74
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)
First Milling Co.	80.00	80.00	0.0%	612.12	Abdullah Al Othaim Markets Co.	14.00	14.00	0.0%	8.35
Jamjoom Pharmaceuticals Factory Co.	98.40	98.40	0.0%	171.18	Abdulmohsen Alhokair Group for Tourism and Development	2.66	2.66	0.0%	3.89
Al Mawarid Manpower Co.	104.20	104.20	0.0%	140.77	Al Kathiri Holding Co.	3.10	3.10	0.0%	3.90
Saudi Aramco Base Oil Co.	140.00	140.00	0.0%	96.17	Alkhabeer REIT Fund	6.83	6.83	0.0%	0.85
Americana Restaurants International PLC	4.27	4.27	0.0%	25.20	Allied Cooperative Insurance Group	15.92	15.92	0.0%	2.75

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	10722.00	2.9%	-6.0%	15761.34	Clicks Group Ltd	26129.00	-0.3%	-3.3%	14685.80
Reinet Investments SCA	41695.00	2.8%	27.4%	13193.55	Anglo American Platinum Ltd	85125.00	-0.1%	-40.3%	35859.76
Growthpoint Properties Ltd	1166.00	2.6%	-19.8%	9619.50					
Naspers Ltd	339900.00	2.5%	20.3%	250020.24					
Capitec Bank Holdings Ltd	156783.00	2.5%	-15.6%	38709.72					
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)
Remgro Ltd	14705.00	14784.00	-0.5%	11355.64	Growthpoint Properties Ltd	1166.00	1138.00	0.6%	9619.50
Bid Corp Ltd	41329.00	41533.00	-0.5%	32457.73	Sasol Ltd	22950.00	22802.00	0.6%	23868.00
Aspen Pharmacare Holdings Ltd	18362.00	18482.00	-0.6%	11546.58	Anglo American PLC	53630.00	52885.00	1.2%	33829.27
Reinet Investments SCA	41695.00	42100.00	-1.0%	13193.55	Mondi PLC	28817.00	28424.00	1.4%	25207.96
Anheuser-Busch InBev SA/NV	106482.00	107541.00	-1.0%	7525.08	Nedbank Group Ltd	22858.00	22371.00	2.2%	31315.46

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam Rubber Group	19400.00	1.8%	40.6%	59.695,09	Bank for Inv. and Devp	43350.00	-2.6%	12.3%	42.878,31
Phat Dat Real Estate Development Corp	16800.00	1.8%	23.5%	235.165,85	Petrovietnam Gas	93000.00	-1.7%	-8.4%	64.035,54
Mobile World Inv. Corp	43300.00	1.4%	0.9%	151.696,50	Vingroup JSC	51000.00	-1.5%	-5.2%	89.719,67
Saigon Securities Inc	25800.00	1.4%	45.8%	372.571,71	Vietnam JSC Bank	29500.00	-1.3%	8.3%	165.347,25
Hoa Phat Group JSC	26150.00	1.4%	45.3%	598.707,06	Vinamilk	71000.00	-1.3%	-6.7%	259.810,54
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%	56.093,25	BaoViet Holdings	44100.00	44100.00	0.0%	34.833,46
FPT Corp	86000.00	97944.43	-12.2%	63.279,10	Mobile World Inv. Corp	43300.00	43300.00	0.0%	151.696,50
Bank for Inv. and Devp	43350.00	49950.00	-13.2%	42.878,31	No Va Land Invest	14850.00	14850.00	0.0%	419.473,54
Sai Gon Thuong Tin Commercial	29800.00	36700.00	-18.8%	240.479,19	Phat Dat Real Estate Development Corp	16800.00	16800.00	0.0%	235.165,85
Vinamilk	71000.00	87004.15	-18.4%	259.810,54	Tien Phong Commercial Joint Stock Bank	18000.00	18000.00	0.0%	47.754,56

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