

Daily Market Report

6 July 2023

JSE

JSE All-Share Index decreased by 0.41% and closed at 75,909.49 points on Wednesday, as the Financials and Technology sectors recorded losses.

BRVM

BRVM Composite Index increased by 0.44% and closed at 200.97 points on Wednesday, with Servair Abidjan Côte d'Ivoire and Ecobank Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index climbed by 1.33% to close at 61,523.57 points on Wednesday, as the Banking, Industrial, and Oil & Gas sectors recorded gains.

EGX

EGX 30 Index decreased by 0.49% and closed at 17,380.33 points on Wednesday, as the market lost LE 5 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.59% to close at 874.42 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.41%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.44%
NGX Nigerian Stock Exchange	▲	1.33%
EGX Egyptian Stock Exchange	▼	0.49%
ESG Casablanca Stock Exchange	▲	0.59%

African Markets

Nigeria: NGX 30 Index climbed by 1.62% to close at 2,226.46 points on Wednesday. BUA Cement and Presco were the top gainers.

Egypt: EGX 30 Index decreased by 0.49% and closed at 17,380.33 points on Wednesday, as the market lost LE 5 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.47% and closed at 1,598.14 points on Wednesday. Stanbic Holdings and WPP Scangroup Plc were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.42% and closed at 70,587.38 points on Wednesday, as the Financials and Technology sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	22.41%
Exchange Rate (I&E window)	₦ 742.31
INTERBANK RATES	
OPR	0.31 ▼
Overnight	1.15 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.38% to close at 9,618.81 points on Wednesday, as gains in the Real Estate, Financials, and Energy sectors led shares higher. MSCI UAE increased by 0.34% to close at 397.06 points.

Vietnam: VN-30 Index was up by 0.16% to close at 1,129.76 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.30% to close at 669.99 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.23% to close at 11,591.55 points on Wednesday, as losses in the Pharma, Biotech & Life Science, Banks, and Software & Services sectors pushed shares lower. MSCI Saudi Arabia inched down by 0.09% and closed at 1,528.37 points.

India: Nifty 50 Index inched up by 0.05% to close at 19,398.50 points on Wednesday, as gains in the Auto, Metal, and Bank led shares higher. MSCI India increased by 0.38% to close at 2,166.19 points.

News

Nigeria:

Agents lament N300bn lost to overtime cargoes
Telecoms investments hit \$76bn, 5G subscriptions now 60,000
Forex scarcity stalls fresh petrol importation

Kenya:

Safaricom plans two new venture capital subsidiaries
World Bank backs rate rise to lift forex inflows
State plans to issue water bond after first attempt failed

Abu Dhabi:

Dubai SME members win Dhs1.12b government procurement contracts
Dubai real estate records second \$1bn day in a row
UAE FDI inflows surge to Dh84 billion in 2022

Saudi Arabia:

Saudi non-oil sector surges as PMI hits 59.6 in June
Saudi Arabia's agricultural GDP grew 38% to \$26.6bn in 2022
MENA needs to invest \$500bn on urban regeneration, says Strategy& report

Egypt:

Egypt plans gas exploration project worth \$1.8bn
Egypt's FDI doubled to \$11bn, flows to Africa dropped to \$45bn in 2022
Egypt built 17 industrial sites across 15 governorates, with 5,046 units in just 9 years

South Africa:

SA inflation seen falling within range by Q3 - central bank governor
Zimbabwe industrial power users aim to raise \$250m for floating solar panels
Eskom declares dispute with Lesedi Local Municipality over R125 million debt

India:

JSW Steel to replace HDFC in Sensex from Jul 13
India in talks to supply 10 million tonnes of green hydrogen to EU
After merger, HDFC Bk loans touch Rs 22.5L cr

Vietnam:

State budget revenue from import-export down over 19% in H1
Close to 180 trillion USD raised through G-bond auctions in first half
Vietnam posts first-half GDP growth of 3.72%

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,618.81	0.4%	0.7%	0.7%	-5.8%	AED/USD	3.67	0.0%	0.0%
Egypt	17,380.33	-0.5%	-1.6%	-1.6%	19.1%	EGP/USD	30.90	0.0%	25.1%
India	19,398.50	0.05%	1.1%	1.1%	7.1%	INR/USD	82.39	0.5%	-0.4%
Kenya	1,598.14	0.5%	1.5%	1.5%	-4.7%	KES/USD	140.80	0.0%	14.0%
Nigeria	2,226.46	1.6%	1.1%	1.1%	20.8%	NGN/USD	742.31	-3.5%	37.8%
Saudi Arabia	11,591.55	-0.2%	1.2%	0.8%	10.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,587.38	-0.4%	-0.2%	-0.2%	5.4%	ZAR/USD	18.80	0.6%	10.4%
Vietnam	1,129.76	0.2%	0.6%	0.6%	12.4%	VND/USD	23,755.00	0.2%	0.5%

MSCI Emerging Markets

MSCI Frontier	491.41	0.2%	1.2%	1.2%	4.0%	Brent Crude (\$)	76.65	2.7%	-10.8%
MSCI Frontier 100	1,115.58	0.1%	1.7%	1.7%	2.3%	Gold (\$)	1,927.10	-0.1%	5.5%
MSCI Emerging	1,001.12	-0.7%	1.4%	1.4%	4.7%	Copper (\$)	8,319.00	-0.5%	-0.6%
MSCI World (USD)	2,960.76	-0.4%	0.9%	0.9%	13.8%	Coffee (\$)	157.96	-0.6%	1.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
BUA Cement	91.00	9.4%	-6.9%	51.94	Unilever	17.00	-2.9%	46.6%	37.96
Presco	195.00	7.7%	41.8%	89.51	Axamansard	3.84	-2.5%	92.0%	16.10
Custodian	7.50	7.1%	26.1%	10.99	United Capital PLC	15.50	-1.3%	10.7%	49.80
Access	17.90	4.4%	110.6%	1536.07					
Transnational Corporation	3.63	4.3%	221.2%	323.51					
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	5.65	5.65	0.0%	477.15	Cap	19.25	15.25	26.2%	0.94
Zenith	34.10	34.10	0.0%	402.70	Nestle	1200.00	764.90	56.9%	50.39
Wema	5.25	5.25	0.0%	24.19	UBN	7.50	4.65	61.3%	0.57
Unilever	17.00	17.00	0.0%	37.96	Unilever	17.00	10.50	61.9%	37.96
UBN	7.50	7.50	0.0%	0.57	Custodian	7.50	4.55	64.8%	10.99

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
APEX INVESTMENT P.S.C	2.12	14.6%	-39.4%	43.21	Aram Group	1.94	-9.8%	-13.0%	0.15
Response Plus Holding PrJSC	4.35	9.3%	-29.7%	7.24	United Arab Bank	1.10	-6.0%	29.4%	0.20
OOREDOO	12.40	7.8%	49.4%	0.02	GHITHA HOLDING	39.00	-3.5%	-46.6%	4.68
ADNOC Logistics & Services plc	3.25	7.6%	0.0%	159.97	Sharjah Cement and Industrial Development Co.	0.63	-3.4%	2.4%	0.01
Manazel PJSC	0.42	6.9%	5.3%	18.25	National Marine Dredging Co.	19.72	-2.5%	-19.4%	25.90
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 (P.S.C)	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

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian Kuwaiti Holding-EGP	37.33	4.3%	18.4%	10.40	Eastern Company	19.80	-4.3%	38.4%	4.02
Sidi Kerir Petrochemicals - SIDPEC	23.81	4.0%	81.5%	121.71	Telecom Egypt	24.50	-3.0%	-2.4%	13.51
Orascom Construction PLC	126.99	3.2%	32.4%	12.23	Ibsina Pharma	2.50	-2.7%	15.7%	34.76
Ezz Steel	37.46	2.9%	61.1%	12.15	E-finance For Digital and Financial Investments	16.80	-2.7%	-11.6%	8.94
Medinet Nasr Housing	3.63	2.0%	11.7%	33.48	Oriental Weavers	14.50	-2.2%	7.1%	18.38
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	24.50	24.50	0.0%	13.51	Cleopatra Hospital Co.	4.44	3.81	16.5%	1.29
Sidi Kerir Petrochemicals - SIDPEC	23.81	23.81	0.0%	121.71	T M G Holding	8.89	6.50	36.8%	30.45
QALA For Financial Investments	2.87	2.87	0.0%	76.02	Taaleem Management Services	3.85	2.72	41.5%	0.38
Palm Hills Development Company	2.10	2.10	0.0%	18.38	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic-Rameda	2.35	1.62	45.1%	11.59
Oriental Weavers	14.50	14.50	0.0%	6.55	E-finance For Digital and Financial Investments	16.80	11.25	49.3%	8.94

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Auto	4900.00	5.9%	35.5%	4271.978	Hdfc Bank	1676.60	-3.0%	3.0%	31249.52
Divi's Laboratories Limited	3760.05	5.9%	10.2%	5942.10	HDFC	2800.00	-2.9%	6.2%	13313.78
HDFC Life Insurance Company Ltd	675.00	4.3%	19.2%	3913.04	Eicher Motors	3313.00	-2.6%	2.6%	9841.72
Maruti Suzuki India	9990.10	3.6%	19.0%	8057.35	UPL	669.65	-1.1%	-6.5%	1518.12
Hero Motocorp	3135.80	3.5%	14.5%	9573.84	Tata Consumer products ltd.	846.45	-1.1%	10.4%	2149.27
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	4900.00	4900.00	0.0%	4271.98	UPL	669.65	636.05	5.3%	1518.12
HUL	2756.95	2759.40	-0.1%	4705.39	Wipro	393.85	352.00	11.9%	2434.19
HDFC Life Insurance Company Ltd	675.00	675.95	-0.1%	3913.04	Kotak Mahindra Bank	1863.05	1643.50	13.4%	5801.31
Titan Company	3106.80	3113.90	-0.2%	1983.16	Tata Consultancy Svs.	3322.00	2926.10	13.5%	4821.89
Maruti Suzuki India	9990.10	10036.95	-0.5%	8057.35	Infosys	1346.00	1185.30	13.6%	7294.41

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	118.00	5.4%	15.7%	0.22	Total Kenya Ltd	19.40	-1.3%	-18.7%	0.03
WPP Scangroup Plc	2.97	2.1%	-1.3%	0.12	The Cooperative Bank of Kenya Ltd	12.10	-0.8%	-1.6%	4.58
NCBA Group Plc	38.95	1.7%	-1.0%	2.28	Kenya Power & Lighting Limited	1.61	-0.6%	3.2%	0.58
Kenya Reinsurance Corporation Ltd	1.81	1.7%	-1.1%	0.07	Safaricom Plc	17.70	-0.6%	-26.7%	41.53
Nairobi Securities Exchange Plc	6.22	1.3%	-8.3%	0.04	KCB Group Plc	29.30	-0.5%	-23.1%	11.40
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)
Stanbic Holdings	118.00	118.00	0.0%	0.22	KCB Group Plc	29.30	28.50	2.8%	11.40
NCBA Group Plc	38.95	40.90	-4.8%	2.28	Total Kenya Ltd	19.40	18.25	6.3%	0.03
Standard Chartered Bank Kenya Ltd	161.75	171.00	-5.4%	0.70	Kengen Limited	2.31	2.15	7.4%	0.17
Absa Bank Kenya	12.10	12.95	-6.6%	75.98	Diamond Trust Bank Limited	48.00	44.00	9.1%	5.05
The Cooperative Bank of Kenya Ltd	12.10	14.00	-13.6%	4.58	Equity Group Holdings Plc	39.25	35.80	9.6%	16.27

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
The Mediterranean and Gulf Insurance and Reinsurance Co.	12.32	10.0%	42.9%	53.50	Arabian Contracting Services Co.	175.00	-5.9%	63.6%	37.08
Saudi Advanced Industries Co.	31.90	6.0%	19.0%	100.40	Saudi Pharmaceutical Industries and Medical Appliances Corp.	41.15	-4.6%	88.9%	49.45
Saudi Chemical Co.	4.17	5.8%	-84.3%	71.64	Saudi Ground Services Co.	36.65	-4.6%	67.8%	75.66
Electrical Industries Co.	37.05	5.7%	57.7%	37.30	National Medical Care Co.	127.00	-4.5%	71.9%	17.72
Al Hassan Ghazi Ibrahim Shaker Co.	27.95	5.3%	46.2%	39.20	Aldrees Petroleum and Transport Services Co.	125.00	-4.3%	68.0%	31.41
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.	86.60	86.60	0.0%	514.64	Abdullah Al Othaim Markets Co.	14.00	14.00	0.0%	13.70
Jamjoom Pharmaceuticals Factory Co.	118.00	118.00	0.0%	350.51	Abdulmohsen Alhokair Group for Tourism and Development	2.42	2.42	0.0%	7.60
Al Mawarid Manpower Co.	117.40	117.40	0.0%	309.80	Al Kathiri Holding Co.	3.09	3.09	0.0%	7.20
Saudi Aramco Base Oil Co.	148.60	148.60	0.0%	207.11	Al-Baha Investment and Development Co.	0.20	0.20	0.0%	0.06
Arabian Drilling Co.	162.00	162.00	0.0%	20.30	Alkhabeer REIT Fund	6.80	6.80	0.0%	1.11

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum Holdings Ltd	13010.00	2.3%	-30.5%	15221.70	Prosus NV	135347.00	-1.5%	14.9%	45352.07
Sanlam Ltd	5999.00	1.2%	23.1%	24415.93	Anglo American PLC	54203.00	-1.5%	-18.3%	31368.90
Anglo American Platinum Ltd	87040.00	1.0%	-38.9%	30950.55	Reinet Investments SCA	41290.00	-1.1%	26.1%	6985.86
Bidvest Group Ltd/The	26485.00	0.7%	23.5%	15391.49	Impala Platinum Holdings Ltd	12630.00	-1.1%	-40.7%	33848.40
Absa Group Ltd	16880.00	0.7%	-12.9%	41693.60	Nedbank Group Ltd	22656.00	-1.1%	6.6%	28093.44
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)
Bid Corp Ltd	41396.00	41573.00	-0.4%	11810.28	Growthpoint Properties Ltd	1175.00	1167.00	0.6%	8812.50
Rengro Ltd	15128.00	15200.00	-0.5%	13797.04	Mondi PLC	29299.00	29023.00	1.0%	20429.61
Aspen Pharmacare Holdings Ltd	18248.00	18380.00	-0.7%	7975.29	Sasol Ltd	23492.00	23216.00	1.2%	19591.86
Anheuser-Busch InBev SA/NV	106601.00	107334.00	-0.7%	8529.15	Anglo American PLC	54203.00	53848.00	1.2%	31368.90
Reinet Investments SCA	41290.00	42199.00	-2.2%	6985.86	Nedbank Group Ltd	22656.00	22283.00	1.7%	28093.44

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group JSC	26950.00	2.7%	49.7%	851,059,16	FPT Corp	74800.00	-14.0%	-2.7%	134,787,06
Phat Dat Real Estate Development Corp	17350.00	2.1%	27.6%	324,128,54	Saigon Securities Inc	26200.00	-1.1%	48.0%	419,974,25
Vietcombank	102000.00	2.0%	27.5%	97,096,68	Vinamilk	69800.00	-1.1%	-8.3%	467,280,81
Viet Nam International Commercial Joint Stock Bank	19900.00	1.3%	4.7%	147,462,82	No Va Land Invest	14700.00	-1.0%	5.0%	357,967,06
Vietnam National Petroleum Group	40300.00	1.1%	27.1%	88,912,80	Vietnam Rubber Group JSC	20100.00	-1.0%	45.7%	102,775,54
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	102000.00	102000.00	0.0%	97,096,68	BaoViet Holdings	44800.00	44800.00	0.0%	23,982,51
Bank for Inv. and Devp	44350.00	49950.00	-11.2%	57,632,99	Mobile World Inv. Corp	43350.00	43350.00	0.0%	318,939,34
Sai Gon Thuong Tin Commercial	29900.00	36700.00	-18.5%	436,622,74	No Va Land Invest	14700.00	14700.00	0.0%	357,967,06
Vinamilk	69800.00	87004.15	-19.8%	467,280,81	Phat Dat Real Estate Development Corp	17350.00	17350.00	0.0%	324,128,54
Sai Gon Thuong Tin Commercial	29900.00	36700.00	-18.5%	436,622,74	Tien Phong Commercial Joint Stock Bank	18100.00	18100.00	0.0%	71,460,02

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