

Daily Market Report

11 July 2023

JSE

JSE All-Share Index decreased by 0.64% and closed at 74,345.98 points on Monday, as the Financials and Industrials sectors recorded losses.

BRVM

BRVM Composite Index increased by 0.27% and closed at 203.02 points on Monday, with Setao Côte d'Ivoire and Nsia Banque Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index surged by 2.48% to close at 64,603.69 on Monday, as the Industrial, Insurance, Oil & Gas and Banking sectors recorded gains.

EGX

EGX 30 Index surged by 2.46% and closed at 16,963.13 points on Monday, as the market gained LE 54.4 billion of market cap, amid foreign and Arab buying.

ESG

Casablanca ESG 10 Index decreased by 0.23% to close at 863.90 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.64%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.27%
NGX Nigerian Stock Exchange	▲	2.48%
EGX Egyptian Stock Exchange	▲	2.46%
ESG Casablanca Stock Exchange	▼	0.23%

African Markets

Nigeria: NGX 30 Index surged by 2.71% to close at 2,350.23 points on Monday. Dangote Cement and FBNH were the top gainers.

Egypt: EGX 30 Index surged by 2.46% and closed at 16,963.13 points on Monday, as the market gained LE 54.4 billion of market cap, amid foreign and Arab buying.

Kenya: NSE 20 Index decreased by 0.36% and closed at 1,612.34 points on Monday. Stanbic Holdings and Diamond Trust Bank were the top losers.

South Africa: JSE Top 40 Index decreased by 0.59% and closed at 69,098.37 points on Monday, as the Financials and Industrials sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	22.41%
Exchange Rate (I&E window)	₦ 744.07
INTERBANK RATES	
OPR	0.93 ▲
Overnight	1.33 ▲

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.20% to close at 9,584.78 points on Monday, as losses in Industrials, Healthcare, Utilities and Telecom sectors pushed shares lower. MSCI UAE decreased by 0.23% to close at 396.23 points.

Vietnam: VN-30 Index climbed by 1.15% to close at 1,142.43 points on Monday, as blue chip companies recorded gains. MSCI Vietnam increased by 1.04% to close at 676.30 points.

Saudi Arabia: Tadawul All Share Index was down by 0.19% to close at 11,586.93 points on Monday, as losses in Media & Entertainment, Retail Materials and Energy sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.39% and closed at 1,520.24 points.

India: Nifty 50 Index was up by 0.12% to close at 19,355.90 points on Monday, as gains in Metal, Financial Services and Infrastructure sectors led shares higher. MSCI India inched up by 0.02% to close at 2,162.32 points.

News

Nigeria:

Nigeria now accounts for 33% of Africa's gas reserves – FG
NGX RegCO, ICAN To Enhance Market Regulation, Investor Protection
Nigeria Slashes Petrol Consumption By 18.6m Litres

Kenya:

IMF sets date for Kenya's fifth review under Sh291bn funding
Kenya's fuel taxes beat South Africa, US on higher VAT
Court deals State another blow in Sh210 billion tax fight

Abu Dhabi:

ENOC and QatarEnergy sign 10-year condensates deal
Abu Dhabi Global Market introduces new rules for tourism sector
Arada sales up 186% in first half of 2023 at Dh4.26b

Saudi Arabia:

Saudi finance companies' portfolios surge 10.8%: SAMA
Riyadh Airports Co., Master Works partner to advance KKIA's operations
New mortgage guarantee firm to boost homeownership in Saudi Arabia

Egypt:

Egypt's annual headline inflation speeds up to 36.8% in June
Egypt launches 20 mobile tech centers for govt services
SCZone receives Chinese delegation to probe coop in several industries

South Africa:

Industrial property rental growth slows
Telkom out to stifle our bid, says Maseko consortium
Dutch-SA agriculture finance hub to drive food security in Sadc

India:

Inflow in equity mutual fund hit 3-month high at Rs 8,637 cr in June
Life insurance premium falls 1% in June qtr
Foxconn withdraws from \$19.5 bn Vedanta chip plan in India

Vietnam:

Quảng Ninh Province exceeds investment capital goals 6M early
Seafood exporters to see improved profits in H2
Carriers prepare to broadcast 5G to the masses

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,584.78	-0.2%	-0.2%	0.4%	-6.1%	AED/USD	3.67	0.0%	0.0%
Egypt	16,963.13	2.5%	-0.8%	-4.0%	16.2%	EGP/USD	30.90	0.1%	25.1%
India	19,355.90	0.1%	0.1%	0.9%	6.9%	INR/USD	82.53	-0.2%	-0.3%
Kenya	1,612.34	-0.4%	-0.4%	2.4%	-3.8%	KES/USD	141.10	0.1%	14.3%
Nigeria	2,350.23	2.7%	2.7%	6.8%	27.6%	NGN/USD	744.07	-4.4%	38.0%
Saudi Arabia	11,586.93	-0.2%	-0.1%	0.8%	10.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,098.37	-0.6%	-0.6%	-2.3%	3.2%	ZAR/USD	18.80	-1.6%	10.5%
Vietnam	1,142.43	1.2%	1.2%	1.7%	13.7%	VND/USD	23,652.50	0.0%	0.1%

MSCI Emerging Markets

MSCI Frontier	494.12	0.6%	0.6%	1.8%	4.6%	Brent Crude (\$)	77.69	-1.0%	-9.6%
MSCI Frontier 100	1,127.56	0.9%	0.9%	2.8%	3.4%	Gold (\$)	1,931.00	-0.1%	5.7%
MSCI Emerging	981.88	0.1%	0.1%	-0.5%	2.7%	Copper (\$)	8,372.50	0.02%	0.01%
MSCI World (USD)	2,931.05	0.2%	0.2%	-0.1%	12.6%	Coffee (\$)	160.41	1.3%	2.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Cement	330.10	10.0%	26.5%	1685.01	Nigerian Breweries	42.60	-2.5%	3.9%	109.87
FBNH	22.30	9.9%	104.6%	4417.54	International Breweries	5.10	-1.9%	8.5%	10.81
Nascon	25.15	9.8%	126.6%	12.14	Guaranty	36.00	-1.9%	56.5%	1476.58
Transnational Corporation	4.50	9.0%	298.2%	706.92	Dangote Sugar	27.35	-0.5%	70.4%	143.16
Sterling	4.50	7.9%	221.4%	724.33	P Z Cussons	22.00	-0.5%	93.8%	16.26
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	7.00	7.00	0.0%	704.69	Cap	19.25	15.25	26.2%	9.17
Zenith	34.80	34.80	0.0%	1688.15	Nestle	1200.00	764.90	56.9%	148.53
Wema	5.50	5.50	0.0%	53.54	Unilever	17.30	10.50	64.8%	12.62
Unilever	17.30	17.30	0.0%	12.62	Custodian	7.50	4.55	64.8%	17.33
UBN	8.25	8.25	0.0%	10.70	Nigerian Breweries	42.60	24.40	74.6%	109.87

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Hotels Co.	7.53	15.0%	96.6%	17.51	Gulf Medical Projects Company	1.85	-9.8%	-14.4%	0.00
Response Plus Holding PrJSC	5.00	14.9%	-19.2%	10.10	Fujairah Cement Industries	0.37	-8.7%	-23.6%	0.01
National Corporation for Tourism & Hotels	3.41	6.6%	13.7%	10.83	Aram Group	1.70	-8.6%	-23.8%	0.14
Al Seer Marine Supplies & Equipment Company P.J.S.C	7.80	4.7%	-17.2%	8.55	Ras Al Khaimah Poultry & Feeding	1.77	-6.8%	9.9%	0.02
Gulf Cement Co.	0.45	3.2%	-13.5%	0.00	Alpha Dhabi Holding PJSC	20.24	-4.5%	-25.3%	124.31
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	Emirates Telecom. Group Company	21.84	21.84	0.0%	32.77
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Anan Investment Holding P.J.S.C	4.07	4.07	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
United Fidelity Insurance Company (P.S.C)	1.60	1.60	0.0%	0.00	United Fidelity Insurance	1.60	1.60	0.0%	0.00
OOREDOO	12.40	12.40	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	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£)
Misr Fertilizers Production Company - Mopco	228.23	20.0%	60.3%	29.84	Credit Agricole Egypt	13.15	-2.7%	55.4%	18.63
Ezz Steel	39.00	8.3%	67.7%	47.27	Eastern Company	18.65	-2.4%	30.3%	31.92
QALA For Financial Investments	2.64	7.8%	26.9%	169.40	Taaleem Mgt Services	3.81	-0.3%	-4.8%	0.46
Ibnsina Pharma	2.26	7.6%	4.6%	35.14	Juhayna Food Industries	12.34	-0.1%	26.0%	14.00
Egyptian Kuwaiti Holding-EGP	36.19	6.7%	14.8%	6.43					
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	24.86	24.86	0.0%	34.51	Cleopatra Hospital Company	4.20	3.81	10.2%	12.02
Sidi Kerir Petrochemicals - SIDPEC	23.10	23.10	0.0%	38.15	T M G Holding	8.50	6.50	30.8%	16.40
QALA For Financial Investments	2.64	2.64	0.0%	169.40	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.20	1.62	35.8%	6.91
Palm Hills Development Company	2.07	2.07	0.0%	13.71	Taaleem Mgt Services	3.81	2.72	40.1%	0.46
Oriental Weavers	14.25	14.25	0.0%	5.56	E-finance For Digital and Financial Investments	16.88	11.25	50.0%	5.27

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Reliance Industries	2735.25	3.9%	7.4%	41871.859	Hcl Technologies	1122.00	-3.1%	8.0%	4469.87
Jsw Steel	811.35	2.9%	5.6%	3846.40	Titan Company	3052.00	-2.9%	17.5%	5448.90
Bharti Airtel	884.70	1.6%	9.8%	3802.84	Power Grid Corp Of India	250.30	-2.0%	17.1%	2873.82
HDFC Life Insurance Company Ltd	668.55	1.6%	18.1%	2461.12	HUL	2657.00	-1.5%	3.7%	4053.85
Bajaj Auto	4900.00	1.4%	35.5%	3240.61	Nestle India Limited	22557.65	-1.5%	15.1%	824.33
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Jsw Steel	811.35	813.80	-0.3%	3846.40	UPL	660.90	654.00	1.1%	1013.42
Bharti Airtel	884.70	889.60	-0.6%	3802.84	Wipro	390.00	352.00	10.8%	1102.97
Reliance Industries	2735.25	2756.00	-0.8%	41871.86	HUL	2657.00	2393.00	11.0%	4053.85
Bajaj Auto	4900.00	4951.00	-1.0%	3240.61	Eicher Motors	3175.00	2836.00	12.0%	5685.98
Ultratech Cement	8350.00	8499.00	-1.8%	1449.39	Tata Consultancy Svs.	3277.00	2926.10	12.0%	4621.45

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	19.55	3.4%	-19.0%	55.12	Stanbic Holdings	116.50	-2.7%	14.2%	0.66
Equity Group Holdings Plc	40.85	2.1%	-8.2%	16.10	Diamond Trust Bank Limited	48.75	-2.5%	-2.5%	0.26
Kenya Reinsurance Corporation Ltd	1.86	1.1%	1.6%	0.09	British American Tobacco Kenya Ltd	442.50	-1.8%	-3.8%	1.02
Nairobi Securities Exchange Plc	6.32	0.3%	-6.8%	0.01	WPP Scangroup Plc	2.93	-1.3%	-2.7%	0.01
					East African Breweries Limited	157.75	-1.3%	-5.8%	1.51
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	116.50	120.00	-2.9%	0.66	KCB Group Plc	29.05	28.50	1.9%	8.96
NCBA Group Plc	39.25	40.90	-4.0%	0.70	Kengen Limited	2.32	2.15	7.9%	0.63
Standard Chartered Bank Kenya Ltd	161.75	171.00	-5.4%	1.88	Total Kenya Ltd	20.00	18.25	9.6%	0.00
Absa Bank Kenya	12.10	12.95	-6.6%	2.35	Bamburi Cement Limited	25.65	23.25	10.3%	0.07
The Cooperative Bank of Kenya Ltd	12.20	14.00	-12.9%	1.26	British American Tobacco Kenya Ltd	442.50	400.00	10.6%	1.02

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Etiad Atheeb Telecommunication Co.	84.00	6.1%	78.9%	168.10	Al-Baha Investment and Development	0.18	-10.0%	-98.4%	38.48
Middle East Healthcare Co.	72.80	4.9%	186.1%	123.76	Anaam International Holding Group	1.27	-9.9%	-93.9%	41.11
Saudi Vitriified Clay Pipes Co.	52.20	4.2%	33.5%	30.11	United Cooperative Assurance Co.	10.46	-4.0%	45.3%	13.00
Power & Water Utility Co for Jubail & Yanbu	87.40	4.2%	86.4%	318.14	First Milling Co.	85.40	-3.0%	100.0%	132.53
National Agricultural Development Co.	43.80	4.0%	114.5%	57.50	Halwani Bros. Co.	69.10	-2.8%	56.0%	54.87
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.	85.40	85.40	0.0%	132.53	Abdullah Al Othaim Markets Co.	14.80	14.80	0.0%	46.33
Jamjoom Pharmaceuticals Factory Co.	111.00	111.00	0.0%	79.05	Abdulmohsen Alhokair Group for Tourism and Development	2.40	2.40	0.0%	3.89
Al Mawarid Manpower Co.	118.00	118.00	0.0%	52.08	Al Kathiri Holding	3.07	3.07	0.0%	7.63
Saudi Aramco Base Oil Co.	149.40	149.40	0.0%	176.41	Al-Baha Investment and Development	0.18	0.18	0.0%	38.48
Arabian Drilling Co.	166.20	166.20	0.0%	40.67	Alkhabeer REIT Fund	6.81	6.81	0.0%	1.10

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Ltd	23815.00	0.8%	-11.6%	28578.00	Northam Platinum Holdings Ltd	11784.00	-3.8%	-37.0%	13787.28
Bid Corp Ltd	41705.00	0.8%	26.4%	30600.63	Impala Platinum Holdings Ltd	12094.00	-2.3%	-43.3%	32170.04
Reinet Investments SCA	41180.00	0.7%	25.8%	4839.47	AngloGold Ashanti	37473.00	-1.8%	13.8%	24744.55
Clicks Group Ltd	25456.00	0.5%	-5.7%	9219.91	Exxaro Resources	16222.00	-1.8%	-25.4%	9751.04
Naspers Ltd	22087.00	0.4%	-92.2%	5942.29	MultiChoice Group	8650.00	-1.7%	-26.2%	23441.50
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	41705.00	41705.00	0.0%	30600.63	Growthpoint Properties Ltd	1159.00	1141.00	0.6%	9886.27
Remgro Ltd	15040.00	15126.00	-0.6%	27824.00	Mondi PLC	29302.00	29025.00	1.0%	7617.93
Reinet Investments SCA	41180.00	41536.00	-0.9%	4839.47	Anglo American PLC	53100.00	52598.00	1.2%	34278.71
Aspen Pharmacare Holdings Ltd	17807.00	18190.00	-2.1%	7957.95	Nedbank Group Ltd	22177.00	21890.00	1.3%	15212.98
Anheuser-Busch InBev SA/NV	104835.00	107500.00	-2.5%	44465.77	Sasol Ltd	23815.00	22826.00	4.3%	28578.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phat Dat Real Estate Development Corp	18500.00	6.9%	36.0%	515311.82	Vietcombank	102700.00	-2.2%	28.4%	94186.60
Bank for Inv. and Devp	46950.00	6.0%	21.6%	210710.85	Saigon Beer Alcohol Beverage Corp.	150300.00	-0.5%	-9.9%	29724.35
Mobile World Inv. Corp	47750.00	5.0%	11.3%	480491.05	Vinhomes	53800.00	-0.4%	12.1%	115920.02
Saigon Securities Inc	27500.00	4.0%	55.4%	831653.34	Vincom Retail	26950.00	-0.2%	2.5%	150198.81
Vietnam National Petroleum Group	41800.00	3.7%	31.9%	98810.76					
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	102700.00	102700.00	0.0%	94186.60	BaoViet Holdings	45600.00	45600.00	0.0%	53584.69
Bank for Inv. and Devp	46950.00	49950.00	-6.0%	210710.85	Mobile World Inv. Corp	47750.00	47750.00	0.0%	480491.05
Vinamilk	72100.00	87004.15	-17.1%	445202.11	No Va Land Invest	14900.00	14900.00	0.0%	408695.91
Sai Gon Thuong Tin Commercial	29850.00	36700.00	-18.7%	333077.60	Phat Dat Real Estate Development Corp	18500.00	18500.00	0.0%	515311.82
Vinamilk	72100.00	87004.15	-17.1%	445202.11	Tien Phong Commercial Joint Stock Bank	18200.00	18200.00	0.0%	106747.38

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