

Daily Market Report

1 August 2023

JSE

JSE All-Share Index increased by 0.60% and closed at 78,977.88 points on Monday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index increased by 0.25% and closed at 208.48 points on Monday, with Saph Côte d'Ivoire and Bolllore Transport & Logistics being the top gainers.

NSE

NGX All-Share Index declined by 1.10% to close at 64,337.52 on Monday, as the Banking, Consumer Goods, and Industrial sectors recorded losses.

EGX

EGX 30 Index increased by 0.24% and closed at 17,595.92 points on Monday, as the market gained LE 1 billion of market cap, amid foreign and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.22% to close at 910.06 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.60%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.25%
NGX Nigerian Stock Exchange	▼	1.10%
EGX Egyptian Stock Exchange	▲	0.24%
ESG Casablanca Stock Exchange	▲	0.22%

African Markets

Nigeria: NGX 30 Index declined by 1.10% to close at 2,344.01 points on Monday. Dangote Sugar and Ecobank were the top losers.

Egypt: EGX 30 Index increased by 0.24% and closed at 17,595.92 points on Monday, as the market gained LE 1 billion of market cap, amid foreign and Arab buying.

Kenya: NSE 20 Index decreased marginally by 0.03% and closed at 1,577.25 points on Monday. East African Breweries Limited and WPP Scangroup Plc were the top losers.

South Africa: JSE Top 40 Index increased by 0.70% and closed at 73,634.06 points on Monday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	22.79%
Exchange Rate (I&E window)	₦ 756.94
INTERBANK RATES	
OPR	0.92 ▲
Overnight	1.42 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.27% to close at 9,787.13 points on Monday, as gains in the Health Care, Industrials, and Financials sectors led shares higher. MSCI UAE increased by 0.72% to close at 407.88 points.

Vietnam: VN-30 Index climbed by 1.42% to close at 1,229.70 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam surged by 2.22% to close at 731.07 points.

Saudi Arabia: Tadawul All Share Index declined by 0.82% to close at 11,692.23 points on Monday, as losses in the Materials, Banks, and Consumer Durables & Apparel sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.33% and closed at 1,534.80 points.

India: Nifty 50 Index increased by 0.55% to close at 19,753.80 points on Monday, as gains in the IT, Pharma, and Auto sectors led shares higher. MSCI India increased by 0.55% to close at 2,210.77 points.

News

Nigeria:

External reserves shed \$167.2m as naira slumps further
NGX market cap gains N1.8tn in July
Currency in circulation hits N2.26tn

Kenya:

Inflation Rate for Kenya Drops to 7.3% in July
ATIDI Insures EUR 300 Million Loan for Tanzania's Projects
Safaricom's Buy Now Pay Later Service Goes Live

Abu Dhabi:

Adnoc brings forward net zero emission target by 5 years to 2045
Adnoc revises net zero target to 2045
Jordan's Arab Bank posts 59% rise in first-half profit to \$401m

Saudi Arabia:

Abu Dhabi's Aldar Properties posts 52% jump in Q2 profit
Abu Dhabi's real estate transactions reach AED46bn in H1 2023
UAE's Aldar invests \$95mln more to expand education portfolio

Egypt:

Egypt government debt-to-GDP estimated at 97% in FY2022/23
Beltona inks MoU to acquire Egyptian company engaged in microfinance activities
Egypt's real estate developers look forward to investing in Saudi Arabia

South Africa:

Glencore buys Argentina copper stake in \$475m deal
June's R3.54bn trade deficit is way below estimates
Liberty Two Degrees posts 7.4% rise in interim distribution

India:

GAIL net falls 51% in Q1 to Rs 1,412 crore on lower petchem margin
Adani Green Energy aims to grow renewable power to 45 GW by 2030: CEO
India's forex kitty drops \$1.98 bn to \$607.03 billion

Vietnam:

Hanoi attracts nearly 2.3 bln USD of FDI in 7 months
VIB's profit up 12%, ROE stands at 29% in H1
Seven-month goods retail sales, service revenue up 10.4%

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,787.13	0.3%	0.3%	0.0%	-4.2%	AED/USD	3.67	0.0%	0.0%
Egypt	17,595.92	0.2%	1.5%	0.0%	20.5%	EGP/USD	30.90	0.2%	25.1%
India	19,753.80	0.5%	0.5%	0.0%	9.1%	INR/USD	82.23	0.0%	-0.6%
Kenya	1,577.25	-0.03%	-0.03%	0.0%	-5.9%	KES/USD	142.40	0.0%	15.3%
Nigeria	2,344.01	-1.1%	-1.1%	0.0%	27.2%	NGN/USD	756.94	-2.5%	39.0%
Saudi Arabia	11,692.23	-0.8%	-1.3%	0.0%	11.6%	SAR/USD	3.75	0.0%	-0.2%
South Africa	73,634.06	0.7%	0.7%	0.0%	10.0%	ZAR/USD	17.88	3.5%	5.0%
Vietnam	1,229.70	1.4%	1.4%	0.0%	22.3%	VND/USD	23,687.50	0.0%	0.2%

MSCI Emerging Markets

MSCI Frontier	515.81	0.6%	0.6%	0.0%	9.2%	Brent Crude (\$)	85.56	0.7%	-0.4%
MSCI Frontier 100	1,182.05	0.7%	0.7%	0.0%	8.4%	Gold (\$)	1,970.50	0.5%	7.9%
MSCI Emerging	1,046.91	0.4%	0.4%	0.0%	9.5%	Copper (\$)	8,831.50	2.0%	5.5%
MSCI World (USD)	3,064.30	0.2%	0.2%	0.0%	17.7%	Coffee (\$)	157.48	-2.1%	0.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	3.74	10.0%	87.0%	17.93	Dangote Sugar	27.00	-10.0%	68.2%	458.05
Custodian	7.85	9.8%	31.9%	2.84	Ecobank	15.30	-10.0%	44.3%	5.81
FCMB	6.55	3.6%	70.1%	323.68	Guinness	59.95	-10.0%	-13.5%	28.34
International Breweries	4.35	2.4%	-7.4%	19.94	P Z Cussons	16.35	-9.9%	44.1%	25.95
Fidelity	8.60	1.2%	97.7%	503.71	Nascon	32.50	-9.7%	192.8%	57.74
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	6.55	6.55	0.0%	323.68	Cap	22.00	15.25	44.3%	3.12
Zenith	33.90	33.90	0.0%	255.39	Unilever	15.50	10.50	47.6%	9.16
Wema	4.50	4.50	0.0%	28.75	Nigerian Breweries	36.50	24.40	49.6%	40.55
UBA	14.00	14.00	0.0%	377.99	UBN	7.00	4.65	50.5%	357.55
UACN	11.05	11.05	0.0%	19.86	Nestle	1175.00	764.90	53.6%	230.63

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ESG EMIRATES STALLIONS GROUP	5.92	15.0%	-23.7%	15.05	United Arab Bank	1.37	-6.2%	61.2%	1.60
Al Buhaira National Insurance Company	2.87	14.8%	12.5%	0.00	ADNOC Gas plc	3.46	-2.3%	23.1%	44.48
Abu Dhabi National Co. for Building Materials	0.31	14.7%	71.0%	0.37	PALMS SPORTS	9.98	-2.2%	1.8%	3.05
Hayah Insurance Company P.J.S.C	1.60	11.9%	64.9%	4.39	Sharjah Cement and Industrial Development Co.	0.63	-2.0%	2.9%	0.00
Manazel PJSC	0.56	11.4%	41.0%	61.77	Fertiglobe plc	3.58	-1.9%	-15.4%	56.53
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 Buhaira National Insurance Company	2.87	2.87	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
Abu Dhabi National Co. for Building Materials	0.31	0.31	0.0%	0.37	Umm Al Qaiwain General Investment	1.02	1.02	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£)
Heliopolis Housing	11.09	4.4%	39.3%	48.71	Oriental Weavers	14.63	-1.2%	40.7%	15.97
Ibsina Pharma	2.21	4.3%	2.3%	43.13	Eastern Company	18.68	-0.9%	30.5%	21.71
GB AUTO	6.70	3.2%	25.0%	17.89	E-finance For Digital and Financial Investments	16.48	-0.7%	-13.3%	175.70
Telecom Egypt	26.20	3.2%	4.4%	39.75	Commercial International Bank (Egypt)	50.50	-0.5%	21.7%	582.95
Ezz Steel	40.00	2.4%	72.0%	28.76	QALA For Financial Investments	2.28	-0.4%	73.0%	11.14
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	26.20	26.20	0.0%	39.75	Cleopatra Hospital Co.	4.08	3.81	7.1%	5.52
Sidi Kerir Petrochemicals - SIDPEC	22.70	22.70	0.0%	11.14	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.20	1.62	35.8%	3.77
Oriental Weavers	14.63	14.63	0.0%	15.97	T M G Holding	9.38	6.50	44.3%	5.94
Orascom Construction PLC	119.98	119.98	0.0%	0.76	Taaleem Management Services	3.93	2.72	44.5%	0.20
Misir Fertilizers Production Company - Mopco	229.80	229.80	0.0%	20.46	E-finance For Digital and Financial Investments	16.48	11.25	46.5%	175.70

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	217.60	3.6%	30.7%	9403.136	Apollo Hospitals Enterprise Ltd	5185.00	-3.0%	15.8%	3588.94
Power Grid Corp Of India	266.05	3.0%	24.5%	4810.32	Britannia Inds.	4810.00	-1.9%	11.7%	3848.00
Adani Ports And Sez.	776.50	2.8%	-5.1%	4525.15	HDFC Life Insurance Company Ltd	647.00	-1.9%	14.3%	2420.25
Tech Mahindra	1119.00	2.6%	10.1%	5273.28	Bajaj Finance	7294.00	-1.2%	10.9%	5476.82
Hindalco Industries	461.50	2.2%	-2.5%	2287.02	Kotak Mahindra Bank	1856.90	-1.1%	1.6%	7475.74
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ONGC	177.00	177.50	-0.3%	1628.43	UPL	622.50	621.00	0.2%	3294.38
Larsen & Toubro	2682.00	2690.00	-0.3%	3415.89	HUL	2559.60	2393.00	7.0%	5132.39
Power Grid Corp Of India	266.05	267.00	-0.4%	4810.32	Kotak Mahindra Bank	1856.90	1643.50	13.0%	7475.74
Grasim Industries	1847.50	1854.70	-0.4%	1100.78	Coal India	229.35	201.35	13.9%	4442.24
NTPC	217.60	218.95	-0.6%	9403.14	Tech Mahindra	1119.00	981.05	14.1%	5273.28

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	47.70	3.5%	-4.6%	4.27	East African Breweries Limited	141.00	-8.1%	-15.8%	2.69
Kenya Reinsurance Corporation Ltd	1.85	2.8%	1.1%	0.21	WPP Scangroup Plc	2.90	-2.0%	-3.7%	0.03
Safaricom Plc	16.90	1.8%	-30.0%	9.44	Centum Investment Company Plc	8.96	-0.4%	7.2%	4.88
Equity Group Holdings Plc	41.00	1.0%	-7.9%	16.76	Absa Bank Kenya	12.35	-0.4%	0.4%	2.32
Kengen Limited	2.32	0.4%	-28.0%	0.53	Bamburi Cement Limited	24.90	-0.2%	-21.0%	0.20
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)
Standard Chartered Bank Kenya Ltd	165.00	171.00	-3.5%	0.26	KCB Group Plc	28.50	28.50	0.0%	15.73
Absa Bank Kenya	12.35	12.95	-4.6%	2.32	Total Kenya Ltd	18.50	18.25	1.4%	0.03
NCBA Group Plc	38.45	40.90	-6.0%	2.75	British American Tobacco Kenya Ltd	418.25	400.00	4.6%	0.21
Stanbic Holdings	120.00	129.75	-7.5%	0.02	Bamburi Cement Limited	24.90	23.25	7.1%	0.20
The Cooperative Bank of Kenya Ltd	11.90	14.00	-15.0%	2.14	Kengen Limited	2.32	2.15	7.9%	0.53

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arabian Drilling Co.	176.40	7.2%	55.8%	83.14	Takween Advanced Industries Co.	17.12	-6.8%	90.2%	12.46
Maharah Human Resources Co.	63.90	4.8%	24.1%	98.97	The Company for Cooperative Insurance	142.80	-6.7%	77.4%	50.14
Almunajem Foods Co.	70.10	4.3%	14.2%	158.76	Saudi Telecom Co.	42.40	-4.4%	15.8%	353.79
Arabian Internet and Communications Services Co.	365.00	4.3%	50.3%	46.15	Sahara International Petrochemical Co.	37.80	-3.1%	11.3%	117.85
Al Mawarid Manpower Co.	140.60	3.2%	1234.0%	120.35	Saudi British Bank	38.10	-3.1%	-2.2%	82.52
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.	88.90	88.90	0.0%	178.61	Abdullah Al Othaim Markets Co.	14.78	14.78	0.0%	21.50
Jamjoom Pharmaceuticals Factory Co.	120.20	120.20	0.0%	76.44	Abdulmohsen Alhokair Group for Tourism and Development	2.31	2.31	0.0%	4.91
Al Mawarid Manpower Co.	140.60	140.60	0.0%	120.35	Al Kathiri Holding Co.	3.04	3.04	0.0%	2.65
Arabian Drilling Co.	176.40	176.40	0.0%	83.14	Al-Baha Investment and Development Co.	0.17	0.17	0.0%	6.40
Power & Water Utility Co for Jubail & Yanbu	77.40	77.40	0.0%	114.88	Alkhabeer REIT Fund	6.87	6.87	0.0%	2.45

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sibanye Stillwater Ltd	3382.00	3.1%	-70.3%	40685.46	Mr Price Group Ltd	15745.00	-1.8%	-0.9%	25821.80
Glencore PLC	10865.00	2.6%	63.6%	18361.85	Anheuser-Busch InBev SA/NV	102600.00	-1.5%	0.2%	38411.39
Woolworths Holdings Ltd	8000.00	2.2%	20.4%	50800.00	Reinet Investments SCA	43388.00	-1.1%	32.5%	7516.54
BHP Group Ltd	55466.00	2.0%	5.3%	26173.30	Exxaro Resources Ltd	16202.00	-1.0%	-25.4%	11399.40
Gold Fields Ltd	27491.00	1.9%	56.1%	51683.08	Vodacom Group Ltd	11797.00	-0.9%	-3.9%	30200.32
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	42360.00	42443.00	-0.2%	40860.88	Nedbank Group Ltd	23500.00	23400.00	0.4%	35955.00
Remgro Ltd	16078.00	16200.00	-0.8%	17525.02	Growthpoint Properties Ltd	1260.00	1259.00	0.6%	11151.00
Anheuser-Busch InBev SA/NV	102600.00	103743.00	-1.1%	38411.39	Anglo American PLC	54846.00	53673.00	1.2%	71848.26
Aspen Pharmacare Holdings Ltd	19179.00	19450.00	-1.4%	10129.58	Sasol Ltd	24848.00	24450.00	1.6%	27332.80
Reinet Investments SCA	43388.00	44300.00	-2.1%	7516.54	Mondi PLC	31377.00	29800.00	5.3%	17874.85

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vingroup JSC	55100.00	7.0%	2.4%	581.943,51	Vietcombank	91600.00	-1.5%	14.5%	134.958,90
Vinhomes	63000.00	7.0%	31.3%	340.678,55	Mobile World Inv. Corp	53700.00	-1.5%	25.2%	419.026,98
Vietjet Aviation	102000.00	4.3%	-6.8%	103.405,33	Hoa Phat Group JSC	28200.00	-0.4%	56.7%	1.261.887,61
Vietnam National Petroleum Group	41500.00	3.6%	30.9%	112.499,59	Saigon Securities Inc	29650.00	-0.3%	67.5%	450.985,68
Asia Commercial JS Bank	22950.00	3.4%	4.8%	436.468,41	Saigon Beer Alcohol Beverage Corp.	156800.00	-0.1%	-6.1%	43.345,79
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	91600.00	96000.00	-4.6%	134.958,90	No Va Land Invest	18850.00	18850.00	0.0%	1.029.702,55
Bank for Inv. and Devp	47200.00	49950.00	-5.5%	88.118,07	Phat Dat Real Estate Development Corp	21700.00	21700.00	0.0%	242.608,72
Vinamilk	78000.00	87004.15	-10.3%	261.639,40	Vietjet Aviation	102000.00	102000.00	0.0%	103.405,33
FPT Corp	85600.00	97944.43	-12.6%	125.219,29	Mobile World Inv. Corp	53700.00	53000.00	1.3%	419.026,98
Vincom Retail	29650.00	37000.00	-19.9%	342.768,06	Tien Phong Commercial Joint Stock Bank	18750.00	18300.00	2.5%	97.155,63

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