

Daily Market Report

10 August 2023

JSE

JSE All-Share Index was closed on Wednesday on account of Women's Day.

BRVM

BRVM Composite Index decreased marginally by 0.02% and closed at 205.32 points on Wednesday, with Societe Ivoirienne de Banque and Sicable Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index dropped by 1.75% to close at 64,167.39 on Wednesday, as the Industrial, Banking, and consumer Goods sectors recorded losses.

EGX

EGX 30 Index inched up by 0.08% and closed at 17,763.63 points on Wednesday, as the market gained LE 974.32 million of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index decreased by 0.31% to close at 905.23 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	↔	0.00%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.02%
NGX Nigerian Stock Exchange	▼	1.75%
EGX Egyptian Stock Exchange	▲	0.08%
ESG Casablanca Stock Exchange	▼	0.31%

African Markets

Nigeria: NGX 30 Index dropped by 1.74% to close at 2,334.75 points on Wednesday. Dangote Cement and Fidelity were the top losers.

Egypt: EGX 30 Index inched up by 0.08% and closed at 17,763.63 points on Wednesday, as the market gained LE 974.32 million of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.65% and closed at 1,588.69 points on Wednesday. Total Kenya Ltd and WPP Scangroup Plc were the top gainers.

South Africa: JSE Top 40 Index was closed on Wednesday on account of Women's Day.

Nigeria Key Indicators

	Current
Inflation	22.79%
Exchange Rate (I&E window)	₦ 782.38
INTERBANK RATES	
OPR	2.83 ▲
Overnight	3.67 ▲

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.37% to close at 9,953.19 points on Wednesday, as losses in the Industrials, Health Care, and Financials sectors pushed shares lower. MSCI UAE increased marginally by 0.02% to close at 410.13 points.

Vietnam: VN-30 Index declined by 0.64% to close at 1,239.84 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.97% to close at 745.82 points.

Saudi Arabia: Tadawul All Share Index increased by 0.37% to close at 11,286.21 points on Wednesday, as gains in the Retailing, Media and Entertainment, and Transportation sectors led shares higher. MSCI Saudi Arabia increased by 0.43% and closed at 1,466.77 points.

India: Nifty 50 Index increased by 0.32% to close at 19,632.55 points on Wednesday, as gains in the Media, Metal, and Oil & Gas sectors led shares higher. MSCI India increased by 0.28% to close at 2,198.96 points.

News

Nigeria:

Niger owes Nigeria N4bn for power supply – NERC
FBN amends AGM agenda, to raise N150bn capital
Manufacturers decry hardship as output declines by N720bn

Kenya:

CBK holds the benchmark lending rate on inflation ease
Kenya's wage bill to rise above Sh1.1 trillion on salaries review
Central Bank of Kenya Retains Benchmark Interest Rate at 10.50%

Abu Dhabi:

ADNOC Gas awards \$3.6bn project to expand its processing infrastructure
Dubai's non-oil private sector maintains steady growth as PMI hits 55.7
DXB Live posts 20% growth in H1 business; expands abroad

Saudi Arabia:

ACWA Power installs first wind turbine in Uzbekistan
Saudi Development Bank boosts business sector with \$1.7bn financing
Saudi fund manager Hassana signs deal with state-owned WTTCO to develop water projects

Egypt:

Madinat Masr records EGP 580m in net profit during 1H 2023
Egypt inks \$4 bln deal with Indian Ocior Energy for green hydrogen projects
GAFI registers first company through its digital platform

South Africa:

Power cuts could wipe out R77bn in tax take
China to deepen, expand trade and investment with SA
SA's \$8.5bn climate pact hit by further delays

India:

RBI maintains pause for 3rd time in a row; keeps repo rate unchanged at 6.5%
DVR share swap to cost Rs 100 crore: Tata Motors
Intel's India engineers seek to beat Nvidia in gen AI chips
Vietnam:
State budget collection tops 1 quadrillion VND in 7 months
Indonesian firms export first batch of Oolong tea to Vietnam
Vietnam, Iran boast potential to boost economic, trade ties: forum

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,953.19	-0.4%	1.7%	1.7%	-2.5%	AED/USD	3.67	0.0%	0.0%
Egypt	17,763.63	0.1%	1.8%	1.0%	21.7%	EGP/USD	30.90	0.0%	25.1%
India	19,632.55	0.3%	0.6%	-0.6%	8.4%	INR/USD	82.86	0.0%	0.1%
Kenya	1,588.69	0.6%	-0.3%	0.7%	-5.2%	KES/USD	143.50	0.1%	16.2%
Nigeria	2,334.73	-1.7%	-1.6%	-0.4%	26.7%	NGN/USD	782.38	3.2%	41.0%
Saudi Arabia	11,286.21	0.4%	-0.8%	-3.5%	7.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	71,341.31	0.0%	-0.4%	-3.1%	6.6%	ZAR/USD	18.98	0.0%	11.5%
Vietnam	1,239.84	-0.6%	0.7%	0.7%	23.3%	VND/USD	23,745.00	0.0%	0.5%

MSCI Emerging Markets

MSCI Frontier	517.81	-0.3%	0.3%	0.4%	9.6%	Brent Crude (\$)	87.55	1.6%	1.9%
MSCI Frontier 100	1,187.55	-0.4%	0.3%	0.5%	8.9%	Gold (\$)	1,950.60	-0.5%	6.8%
MSCI Emerging	1,008.42	0.5%	-0.9%	-3.7%	5.4%	Copper (\$)	8,397.50	0.6%	0.3%
MSCI World (USD)	2,976.31	-0.4%	-0.3%	-2.9%	14.4%	Coffee (\$)	159.59	-0.4%	2.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	15.00	3.4%	7.1%	98.05	Nascon	36.90	-10.0%	232.4%	16.84
Ecobank	15.50	3.3%	46.2%	85.92	Dangote Cement	320.00	-9.1%	22.6%	55.81
Lafarge Africa	28.00	1.1%	16.7%	141.91	Fidelity	7.60	-3.8%	74.7%	161.33
Transnational Corporation	3.65	0.6%	223.0%	35.95	International Breweries	4.60	-2.1%	-2.1%	3.36
FCMB	6.18	0.0%	60.5%	37.22	Sterling	3.44	-2.0%	145.7%	113.80
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	6.18	6.18	0.0%	37.22	Cap	22.00	15.25	44.3%	2.51
Zenith	35.00	35.00	0.0%	213.34	UBN	7.00	4.65	50.5%	3.00
Wema	4.65	4.65	0.0%	4.55	Nestle	1175.00	764.90	53.6%	12.08
UBA	14.40	14.40	0.0%	176.56	Unilever	16.20	10.50	54.3%	3.41
UACN	11.00	11.00	0.0%	4.70	Custodian	7.65	4.55	68.1%	2.64

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 Co. for Building Materials	0.42	14.9%	127.3%	2.26	Sharjah Cement and Industrial Development Co.	0.63	-2.9%	2.6%	0.00
Gulf Medical Projects Company	2.10	8.8%	-2.8%	0.00	BURJEEL HOLDINGS	2.80	-2.1%	23.3%	21.39
GHITHA HOLDING P.J.S.C.	43.96	6.8%	-39.8%	7.27	Americana Restaurants International PLC	3.97	-2.0%	33.7%	14.97
Abu Dhabi Ship Building Co.	4.40	6.3%	7.3%	15.85	Easy Lease Motorcycle Rental	33.24	-2.0%	-4.5%	4.30
APEX INVESTMENT P.S.C	2.41	4.3%	-31.1%	36.54	DANA GAS PJSC	0.94	-1.5%	2.2%	17.97
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	1.49	1.49	0.0%	0.00
Sawaeed Holding P.J.S.C	6.78	6.78	0.0%	0.00	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£)
GB AUTO	45.03	4.4%	740.1%	75.19	Commercial International Bank	3.67	-4.7%	-91.2%	664.74
Juhayna Food Industries	12.26	3.9%	25.2%	227.83	Taaleem Management Services	22.90	-2.1%	472.5%	22.03
E-finance For Digital and Financial Investments	18.20	2.3%	-4.3%	15.51	T M G Holding	2.26	-1.3%	-77.4%	43.29
Misr Fertilizers Production Company - Mopco	3.48	2.1%	-97.6%	55.97	Orascom Construction PLC	222.16	-1.3%	131.5%	9.31
Abou Kir Fertilizers	48.60	1.6%	25.3%	49.50	Alexandria Mineral Oils Company	25.30	-1.2%	-37.7%	18.37
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£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	27.07	27.07	0.0%	35.32	Commercial International Bank	3.67	3.67	0.0%	664.74
Taaleem Management Services	22.90	22.90	0.0%	22.03	Egyptian Kuwaiti Holding-EGP	16.14	16.14	0.0%	115.20
QALA For Financial Investments	15.92	15.92	0.0%	66.19	Misr Fertilizers Production Company	3.48	3.48	0.0%	55.97
Palm Hills Development Company	10.93	10.93	0.0%	4.84	Sidi Kerir Petrochemicals	2.01	2.01	0.0%	27.12
Oriental Weavers	117.99	117.99	0.0%	1.38	T M G Holding	2.26	2.26	0.0%	43.29

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Dr Reddys Lab	5879.80	3.9%	38.8%	11751.428	Divi's Laboratories Limited	3743.70	-2.7%	9.7%	2815.14
Jsw Steel	826.95	3.2%	7.7%	2561.26	Apollo Hospitals Enterprise Ltd	4975.05	-1.0%	11.1%	1339.66
Hindalco Industries	468.00	2.9%	-1.1%	2833.37	Maruti Suzuki India	9468.00	-0.8%	12.8%	3827.84
Tata Motors	623.50	2.7%	60.7%	8213.70	Bajaj Finance	7120.00	-0.8%	8.3%	3646.97
Mahindra & Mahindra	1535.80	2.4%	22.9%	5656.69	Asian Paints	3325.20	-0.7%	7.7%	2139.32
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	826.95	828.90	-0.2%	2561.26	UPL	615.20	590.10	4.3%	2863.91
Cipla	1262.10	1271.65	-0.8%	2659.26	HUL	2553.35	2393.00	6.7%	3089.97
ONGC	177.00	178.65	-0.9%	849.69	Kotak Mahindra Bank	1826.00	1643.50	11.1%	4792.78
Grasim Industries	1847.20	1868.40	-1.1%	969.21	Coal India	234.70	207.05	13.4%	8219.98
Sun Pharma Industries	1152.80	1169.70	-1.4%	1501.88	State Bank Of India	573.65	499.35	14.9%	9006.37

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	21.00	8.8%	-11.9%	0.00	KCB Group Plc	29.25	-2.0%	-23.2%	6.94
WPP Scangroup Plc	2.98	4.6%	-1.0%	0.35	Kenya Power & Lighting Limited	1.52	-1.3%	-2.6%	1.29
Bamburi Cement Limited	26.15	4.4%	-17.0%	0.21	NCBA Group Plc	39.00	-0.9%	-0.9%	15.88
East African Breweries Limited	144.75	2.5%	-13.6%	2.00	Kengen Limited	2.40	-0.8%	-25.5%	0.44
Stanbic Holdings	116.75	1.5%	14.5%	0.32	Kenya Reinsurance Corporation Ltd	1.88	-0.5%	2.7%	0.23
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	166.00	171.00	-2.9%	0.81	KCB Group Plc	29.25	28.50	2.6%	6.94
Absa Bank Kenya	12.45	12.95	-3.9%	1.74	Diamond Trust Bank Limited	47.00	44.00	6.8%	1.88
NCBA Group Plc	39.00	41.70	-6.5%	15.88	British American Tobacco Kenya Ltd	435.00	400.00	8.7%	0.96
Stanbic Holdings	116.75	129.75	-10.0%	0.32	Nairobi Securities Exchange Plc	6.22	5.62	10.7%	0.09
The Cooperative Bank of Kenya Ltd	12.00	14.00	-14.3%	4.17	Kengen Limited	2.40	2.15	11.6%	0.44

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Gulf Union Alahlia	13.48	10.0%	58.2%	44.21	Savola Group	36.65	-7.5%	33.5%	111.02
National Agricultural Development Co.	48.60	7.3%	138.0%	31.27	Fitaihi Holding Group	3.53	-4.9%	-88.1%	18.65
Arabian Pipes Co.	65.90	7.2%	64.8%	59.06	Mouwasat Medical Services Co.	105.00	-4.6%	-49.8%	85.37
Alujain Holding Corp.	48.40	6.6%	29.9%	17.21	Gulf General Cooperative Insurance Co.	8.24	-3.6%	21.0%	15.31
Al-Baha Investment and Development Co.	0.17	6.3%	-98.5%	7.96	Al Yamamah Steel Industries Co.	24.36	-3.1%	8.8%	8.92
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%	35.09	Abdullah Al Othaim Markets Co.	14.44	14.44	0.0%	13.93
Jamjoom Pharmaceuticals Factory Co.	115.80	115.80	0.0%	37.79	Abdulmohsen Alhokair Group for Tourism and Development	2.27	2.27	0.0%	3.27
Al Mawarid Manpower Co.	136.00	136.00	0.0%	52.52	Al Kathiri Holding Co.	2.99	2.99	0.0%	2.35
Arabian Drilling Co.	176.80	176.80	0.0%	26.15	Al-Baha Investment and Development Co.	0.17	0.17	0.0%	7.96
Power & Water Utility Co for Jubail & Yanbu	75.80	75.80	0.0%	101.20	Alkhabeer REIT Fund	6.84	6.84	0.0%	1.37

South Africa*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Exxaro Resources Ltd	15064.00	1.5%	-30.7%	11876.16	Northam Platinum Holdings Ltd	13202.00	-3.8%	-29.5%	17822.70
Gold Fields Ltd	25127.00	1.3%	42.6%	52766.70	Anglo American Platinum Ltd	77988.00	-2.9%	-45.3%	27758.27
NEPI Rockcastle NV	11137.00	1.3%	8.1%	11693.85	Sibanye Stillwater Ltd	3060.00	-2.3%	-31.6%	44400.60
Aspen Pharmacare Holdings Ltd	19750.00	1.1%	44.9%	10756.44	MultiChoice Group	8600.00	-2.3%	-26.6%	14620.00
British American Tobacco PLC	61539.00	1.0%	-8.7%	18963.24	Impala Platinum Holdings Ltd	11129.00	-2.0%	-47.8%	42735.36
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)
Aspen Pharmacare Holdings Ltd	19750.00	19750.00	0.0%	10756.44	Nedbank Group Ltd	22970.00	22846.00	0.5%	26415.50
Anheuser-Busch InBev SA/NV	106311.00	106852.00	-0.5%	14512.51	Growthpoint Properties Ltd	1302.00	1288.00	0.6%	9439.50
Bid Corp Ltd	42504.00	42835.00	-0.8%	30001.02	Anglo American PLC	51775.00	51083.00	1.2%	60576.75
Remgro Ltd	15960.00	16133.00	-1.1%	13200.20	Sasol Ltd	25018.00	24498.00	2.1%	50036.00
Reinet Investments SCA	43080.00	43652.00	-1.3%	6361.19	Mondi PLC	31143.00	30500.00	2.1%	23510.47

*Market closed on 9/8

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Sai Gon Thuong Tin Commercial	31200.00	4.7%	38.7%	1.153.579,41	Vinhomes	60600.00	-3.5%	26.3%	342.718,24
Hoa Phat Group JSC	27800.00	2.2%	54.4%	1.176.764,55	Vinamilk	73100.00	-1.9%	-3.9%	272.228,41
					Mobile World Inv. Corp	52600.00	-1.9%	22.6%	472.612,25
					Vingroup JSC	65800.00	-1.8%	22.3%	648.304,69
					Saigon Securities Inc	28600.00	-1.7%	61.6%	479.603,32
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vietnam National Petroleum Group	161000.00	161000.00	0.0%	20.531,05	Mobile World Inv. Corp	52600.00	52600.00	0.0%	472.612,25
Bank for Inv. and Devp	48200.00	49950.00	-3.5%	87.280,92	No Va Land Invest	40700.00	40700.00	0.0%	50.421,06
Vietcombank	90200.00	96000.00	-6.0%	53.457,97	Phat Dat Real Estate Development Corp	13900.00	13900.00	0.0%	143.445,99
Vietnam JSC Bank	32500.00	38200.00	-14.9%	259.361,58	Saigon Beer Alcohol Beverage Corp.	30000.00	30000.00	0.0%	40.092,02
FPT Corp	83100.00	97944.43	-15.2%	82.131,80	Vietjet Aviation	101600.00	101600.00	0.0%	66.665,80

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