

Daily Market Report

16 August 2023

JSE

JSE All-Share Index declined by 0.75% and closed at 75,590.75 points on Tuesday, as the Financials and Resources sectors recorded losses.

BRVM

BRVM Composite Index was closed on Tuesday on account of Assumption Day.

NSE

NGX All-Share Index was down by 0.17% to close at 64,928.98 on Tuesday, as the Consumer Goods, Oil & Gas, and Banking sectors recorded losses.

EGX

EGX 30 Index increased by 0.38% and closed at 17,965.32 points on Tuesday, as the market gained LE 2.77 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index was up by 0.19% to close at 903.31 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.75%
BRVM Bourse Régionale des Valeurs Mobilières	↔	0.00%
NGX Nigerian Stock Exchange	▼	0.17%
EGX Egyptian Stock Exchange	▲	0.38%
ESG Casablanca Stock Exchange	▲	0.19%

African Markets

Nigeria: NGX 30 Index was down by 0.16% to close at 2,366.13 points on Tuesday. Dangote Sugar and International Breweries were the top losers.

Egypt: EGX 30 Index increased by 0.38% and closed at 17,965.32 points on Tuesday, as the market gained LE 2.77 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index declined by 0.88% and closed at 1,562.82 points on Tuesday. Total Kenya Ltd and Nairobi Securities Exchange Plc were the top losers.

South Africa: JSE Top 40 Index declined by 0.83% and closed at 70,045.38 points on Tuesday, as the Financials and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 774.77
INTERBANK RATES	
OPR	7.30 ▲
Overnight	8.40 ▲

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.32% to close at 9,848.32 points on Tuesday, as losses in the Real Estate, Industrials, and Energy sectors pushed shares lower. MSCI UAE declined by 0.58% to close at 401.23 points.

Vietnam: VN-30 Index was down by 0.18% to close at 1,241.24 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.68% to close at 752.12 points.

Saudi Arabia: Tadawul All Share Index declined by 0.70% to close at 11,412.88 points on Tuesday, as losses in the Energy, Banks, and Telecommunication Services sectors pushed shares lower. MSCI Saudi Arabia declined by 0.68% and closed at 1,477.75 points.

India: Nifty 50 Index was closed on Tuesday on account of Independence Day.

News

Nigeria:

Wema Bank, enza to boost e-commerce
Fuel marketers kick as FG rules out price hike
FG targets capital market to meet N100tn assets goal

Kenya:

Kenya's debt up record Sh1.56trn
Kenya buys 94pc of used vehicles from Japan
Equity Group Half Year 2023 Net Profit Jumps 7.8% to KES 26.3 Bn

Abu Dhabi:

Dubai real estate enters new era after record \$60bn sales
Dubai Chamber of Commerce handles \$11.5m in mediation cases
Abu Dhabi manufacturing investment hits \$105bn

Saudi Arabia:

Saudi Arabia's inflation eases to 2.3% in July
PIF records \$39bn in US equities holdings in Q2
KAUST signs MoU to accelerate adoption of sustainable energy solutions

Egypt:

Egypt's economy and IMF agreement amid exchange rate uncertainty
Egypt to import wheat from UAE's Al Dhakra in a \$500M agreement
Egypt to boost transit trade and re-exports

South Africa:

Sanlam forced to bail out failed R8bn BEE deal
Absa's home loan bad debt charges shoot up 260%
Rand weakens to R19-mark amid US inflation and slow growth in China

India:

Infosys bags \$1.6bn contract from telecom major Liberty
Gangwals may sell 5.6% in IndiGo for \$450mn
17 of 24 Adani cases probed, need 15 days for final report: Sebi to SC

Vietnam:

Digital economy contributes 15% to GDP in H1
VinFast debuts on Nasdaq Global Select Market
Vietnam-Korea trade promotion week slated for September in Hai Phong

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,807.19	-0.4%	-0.7%	0.2%	-4.0%	AED/USD	3.67	0.0%	0.0%
Egypt	17,965.32	0.4%	1.4%	2.1%	23.1%	EGP/USD	30.90	0.0%	25.1%
India	19,434.55	0.0%	0.03%	-1.6%	7.3%	INR/USD	83.36	0.2%	0.7%
Kenya	1,562.82	-0.9%	-2.0%	-0.9%	-6.8%	KES/USD	143.80	0.0%	16.4%
Nigeria	2,366.13	-0.2%	-0.6%	0.9%	28.4%	NGN/USD	774.77	3.9%	40.4%
Saudi Arabia	11,412.88	-0.7%	-0.1%	-2.4%	8.9%	SAR/USD	3.75	0.0%	-0.2%
South Africa	70,045.38	-0.8%	-1.9%	-4.9%	4.6%	ZAR/USD	19.13	0.3%	12.4%
Vietnam	1,241.24	-0.2%	0.04%	0.8%	23.5%	VND/USD	23,975.00	0.6%	1.4%

MSCI Emerging Markets

MSCI Frontier	516.06	-0.1%	-0.6%	0.05%	9.3%	Brent Crude (\$)	84.89	-1.5%	-1.2%
MSCI Frontier 100	1,183.31	-0.1%	-0.4%	0.1%	8.5%	Gold (\$)	1,935.20	-0.5%	6.0%
MSCI Emerging	981.80	-0.5%	-1.6%	-6.2%	2.7%	Copper (\$)	8,199.50	-1.1%	-2.1%
MSCI World (USD)	2,948.22	-1.0%	-0.8%	-3.8%	13.3%	Coffee (\$)	151.31	-3.0%	-3.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	5.00	7.8%	28.2%	49.28	Unilever	14.50	-7.1%	25.0%	12.79
Axamansard	3.90	2.6%	95.0%	4.01	UACN	10.30	-4.6%	0.5%	46.19
Zenith	34.40	0.9%	43.3%	383.57	Dangote Sugar	33.00	-4.3%	105.6%	63.60
MTNN	280.00	0.04%	30.2%	972.34	International Breweries	4.55	-3.2%	-3.2%	4.61
					FBNH	17.95	-1.9%	64.7%	42.95
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	6.05	6.05	0.0%	18.19	Cap	19.80	15.25	29.8%	2.42
Zenith	34.40	34.40	0.0%	383.57	Unilever	14.50	10.50	38.1%	12.79
Wema	5.00	5.00	0.0%	49.28	UBN	7.00	4.65	50.5%	2.82
UBA	14.00	14.00	0.0%	325.42	Nestle	1170.00	764.90	53.0%	454.83
Transnational Corporation	4.00	4.00	0.0%	147.50	Custodian	7.65	4.55	68.1%	1.60

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Co. for White Cement & Construction Materials	1.50	5.6%	-16.2%	0.10	Union Insurance Co.	0.56	-10.0%	-11.7%	0.00
ADNOC Gas plc	3.68	3.1%	31.0%	93.73	Abu Dhabi National Co. for Building Materials	0.38	-9.9%	109.3%	0.59
ADNOC Drilling Company PJSC	3.97	2.3%	33.2%	26.78	Manazel PJSC	0.51	-4.1%	29.6%	7.47
Gulf Pharmaceutical Industries	0.87	1.4%	-24.9%	0.10	National Marine Dredging Co.	20.66	-3.9%	-15.6%	21.83
Abu Dhabi National Oil Company For Distribution	3.92	1.3%	-11.1%	23.98	RAK Properties	1.10	-3.5%	61.8%	15.01
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£)
Sidi Kerir Petrochemicals	23.95	4.1%	82.5%	72.81	Ezz Steel	46.01	-3.7%	97.9%	61.19
Credit Agricole Egypt	14.78	3.7%	74.7%	33.70	Egyptian Tourism Resorts	2.91	-3.0%	48.5%	6.26
Orascom Hotels	11.01	2.9%	57.3%	17.84	Misr El Gadida for Housing Dev	12.07	-2.1%	51.6%	92.09
Misr Fertilizers Production Co.	235.42	2.4%	65.3%	196.32	Belton Financial Hld	3.64	-1.6%	205.9%	464.79
T M G Holding	9.69	2.2%	-3.0%	13.57	Abu Dhabi Islamic Bank- Egypt	24.62	-1.5%	37.0%	5.78
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£)
Oriental Weavers	15.80	18.43	-14.3%	3.14	T M G Holding	9.69	6.88	40.8%	13.57
Palm Hills Development Company	1.97	2.40	-17.9%	10.28	Egyptian Kuwaiti Holding-EGP	36.35	20.30	79.1%	7.23
Taallem Management Services	3.75	4.60	-18.5%	0.63	Commercial International Bank	51.99	24.55	111.8%	230.68
QALA For Financial Investments	2.26	3.06	-26.1%	36.30	Misr Fertilizers Production Company	235.42	91.02	158.6%	196.32
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.13	3.17	-32.8%	6.54	Sidi Kerir Petrochemicals	23.95	5.87	308.0%	72.81

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	3744.80	1.8%	9.7%	4752.951	Adani Enterprises Limited	2446.95	-3.6%	-36.6%	23982.26
Infosys	1392.95	1.5%	-7.6%	5957.48	Jsw Steel	798.15	-2.7%	3.9%	1493.33
LTIMINDTREE LIMITED	5182.00	1.5%	18.7%	2044.98	Hindalco Industries	448.85	-2.3%	-5.2%	2058.35
HUL	2532.95	1.3%	-1.1%	2676.54	State Bank Of India	561.00	-2.3%	-8.6%	15767.53
Reliance Industries	2573.20	1.0%	1.0%	12271.55	Adani Ports And Sez.	784.00	-2.1%	-4.2%	13965.04
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	178.20	180.45	-1.2%	2300.98	UPL	590.00	586.00	0.7%	1231.68
Dr Reddys Lab	5812.05	5916.65	-1.8%	2531.03	HUL	2532.95	2393.00	5.8%	2676.54
Hcl Technologies	1170.00	1202.60	-2.7%	2008.49	Kotak Mahindra Bank	1795.00	1643.50	9.2%	5921.94
Grasim Industries	1811.55	1868.40	-3.0%	953.63	State Bank Of India	561.00	499.35	12.3%	15767.53
Mahindra & Mahindra	1544.95	1594.80	-3.1%	2882.19	Coal India	234.15	207.60	12.8%	1420.31

*Market closed on 15/8

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	20.60	3.0%	29.2%	0.22	Total Kenya Ltd	19.10	-8.8%	-19.9%	0.02
Stanbic Holdings	121.50	0.2%	19.1%	6.22	Nairobi Securities Exchange Plc	6.04	-3.5%	-10.9%	0.01
					WPP Scangroup Plc	2.80	-2.8%	-7.0%	0.01
					Centum Investment Company Plc	9.00	-1.7%	7.7%	0.89
					Diamond Trust Bank Limited	46.80	-1.7%	-6.4%	0.12
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	163.50	171.00	-4.4%	2.37	KCB Group Plc	28.10	28.50	-1.4%	9.04
Absa Bank Kenya	12.15	12.95	-6.2%	0.84	Total Kenya Ltd	19.10	18.25	4.7%	0.02
Stanbic Holdings	121.50	129.75	-6.4%	6.22	Diamond Trust Bank Limited	46.80	44.00	6.4%	0.12
NCBA Group Plc	38.70	41.70	-7.2%	1.89	Nairobi Securities Exchange Plc	6.04	5.62	7.5%	0.01
Nation Media Group	20.60	23.90	-13.8%	0.22	British American Tobacco Kenya Ltd	430.00	400.00	7.5%	43.34

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Bupa Arabia for Cooperative Insurance Co.	199.40	6.1%	38.7%	127.71	Musharaka REIT Fund	6.89	-7.8%	-22.1%	9.91
Riyadh Cables Group Co.	66.90	5.0%	80.1%	59.89	Al-Baha Investment and Development Co.	0.15	-6.3%	-98.7%	2.18
Nahdi Medical Co.	157.00	3.7%	-6.1%	163.97	National Metal Manufacturing and Casting Co.	19.00	-3.7%	12.3%	3.10
Arabian Pipes Co.	72.20	3.1%	80.5%	51.82	Abdullah Al Othaim Markets Co.	14.40	-3.5%	-86.2%	41.92
The Company for Cooperative Insurance	146.00	3.0%	81.4%	58.61	Emaar The Economic City	9.03	-3.4%	8.3%	38.24
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.	90.30	90.30	0.0%	35.05	Abdullah Al Othaim Markets Co.	14.40	14.40	0.0%	41.92
Jamjoom Pharmaceuticals Factory Co.	115.00	115.00	0.0%	43.90	Abdulmohsen Alhokair Group for Tourism and Development	2.35	2.35	0.0%	6.28
Al Mawarid Manpower Co.	134.40	134.40	0.0%	54.11	Al Kathiri Holding Co.	3.01	3.01	0.0%	5.32
Arabian Drilling Co.	186.80	186.80	0.0%	45.69	Al-Baha Investment and Development Co.	0.15	0.15	0.0%	2.18
Americana Restaurants International PLC	4.37	4.37	0.0%	106.11	Alkhabeer REIT Fund	6.66	6.66	0.0%	1.86

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	25104.00	1.7%	42.5%	33388.32	Nedbank Group Ltd	21271.00	-4.4%	0.1%	62111.32
NEPI Rockcastle NV	11324.00	1.4%	9.9%	12796.12	Sasol Ltd	24570.00	-3.5%	-8.8%	38820.60
Naspers Ltd	336392.00	1.2%	19.1%	105990.39	Anglo American Platinum Ltd	70000.00	-3.0%	-50.9%	36963.50
AngloGold Ashanti Ltd	34140.00	1.1%	3.7%	32119.25	Glencore PLC	10340.00	-2.8%	-9.3%	18818.80
Prosus NV	136686.00	0.7%	16.1%	57185.32	Capitec Bank Holdings Ltd	171676.00	-2.4%	-7.6%	51095.93
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	15816.00	15845.00	-0.2%	14049.67	Nedbank Group Ltd	21271.00	21271.00	0.0%	62111.32
Anheuser-Busch InBev SA/NV	107160.00	107710.00	-0.5%	14552.33	Sasol Ltd	24570.00	24514.00	0.2%	38820.60
Aspen Pharmacare Holdings Ltd	19515.00	19631.00	-0.6%	9439.41	Mondi PLC	31116.00	30967.00	0.5%	12583.62
Reinet Investments SCA	43581.00	44002.00	-1.0%	7320.74	Growthpoint Properties Ltd	1234.00	1231.00	0.6%	10834.52
Bid Corp Ltd	41802.00	42498.00	-1.6%	23432.53	Anglo American PLC	49140.00	49033.00	1.2%	51105.60

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vincom Retail	31300.00	3.3%	19.0%	284.865,03	Vingroup JSC	70700.00	-3.6%	31.4%	1.059.538,71
Tien Phong Commercial Joint Stock Bank	19000.00	1.9%	-9.7%	228.188,40	Saigon Securities Inc	28700.00	-1.5%	62.1%	380.007,64
Vietjet Aviation	101900.00	1.7%	-6.9%	82.600,82	Bank for Inv. and Devp	47000.00	-1.3%	21.8%	78.076,39
FPT Corp	84000.00	1.7%	9.2%	139.129,06	Asia Commercial JS Bank	22850.00	-0.9%	4.3%	148.306,69
Phat Dat Real Estate Development Corp	13900.00	1.1%	2.2%	174.229,69	Saigon Beer Alcohol Beverage Corp.	29500.00	-0.8%	-82.3%	27.257,57
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	157300.00	157300.00	0.0%	23.200,63	No Va Land Invest	40350.00	40350.00	0.0%	48.764,71
Bank for Inv. and Devp	47000.00	49950.00	-5.9%	78.076,39	Phat Dat Real Estate Development Corp	13900.00	13900.00	0.0%	174.229,69
Vietcombank	88900.00	96000.00	-7.4%	102.120,37	Saigon Beer Alcohol Beverage Corp.	29500.00	29500.00	0.0%	27.257,57
Sai Gon Thuong Tin Commercial	31500.00	36700.00	-14.2%	534.949,36	Vietjet Aviation	101900.00	101900.00	0.0%	82.600,82
Vietnam JSC Bank	32400.00	38200.00	-15.2%	168.936,34	BaoViet Holdings	47200.00	46600.00	1.3%	24.776,35

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