

Daily Market Report

17 August 2023

JSE

JSE All-Share Index declined by 0.89% and closed at 74,914.50 points on Wednesday, as the Resources and Industrial sectors recorded losses.

BRVM

BRVM Composite Index increased by 0.39% and closed at 206.74 points on Wednesday, with Filtisac Côte d'Ivoire and Saph Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index decreased by 0.47% to close at 64,625.28 on Wednesday, as the Insurance and Banking sectors recorded losses.

EGX

EGX 30 Index increased by 0.54% and closed at 18,062.50 points on Wednesday, as the market gained LE 4.64 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index was down by 0.14% to close at 902.05 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.89%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.39%
NGX Nigerian Stock Exchange	▼	0.47%
EGX Egyptian Stock Exchange	▲	0.54%
ESG Casablanca Stock Exchange	▼	0.14%

African Markets

Nigeria: NGX 30 Index decreased by 0.48% to close at 2,354.71 points on Wednesday. Airtel Africa and Fidelity were the top losers.

Egypt: EGX 30 Index increased by 0.54% and closed at 18,062.50 points on Wednesday, as the market gained LE 4.64 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index declined by 0.79% and closed at 1,550.44 points on Wednesday. Safaricom Plc and East African Breweries Limited were the top losers.

South Africa: JSE Top 40 Index declined by 1.00% and closed at 69,342.56 points on Wednesday, as the Resources and Industrial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 759.86
INTERBANK RATES	
OPR	19.06 ▲
Overnight	19.64 ▲

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.27% to close at 9,780.79 points on Wednesday, as losses in the Real Estate, Financial, and Health Care sectors pushed shares lower. MSCI UAE decreased by 0.47% to close at 399.34 points.

Vietnam: VN-30 Index climbed by 1.23% to close at 1,256.51 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.50% to close at 763.42 points.

Saudi Arabia: Tadawul All Share Index was down by 0.18% to close at 11,392.76 points on Wednesday, as losses in the Commercial & Professional Svc, Transportation, and Health Care Equipment & Svc sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.35% and closed at 1,472.53 points.

India: Nifty 50 Index was up by 0.16% to close at 19,465.00 points on Wednesday, as gains in the Media, Realty, and Bank sectors led shares higher. MSCI India was up by 0.18% to close at 2,181.28 points.

News

Nigeria:

Nigeria earns \$742bn oil revenue in 21 years – NEITI
Naira rebounds, trades 850/dollar at parallel market
MTN issues N100bn commercial papers

Kenya:

State eyes Sh500m from new training levy on its suppliers
NSSF pays fund managers Sh619m fees to June 2022
State-owned firms pay Treasury Sh41bn

Abu Dhabi:

UAE freezone sees boom in Chinese interest amid \$200bn trade target
MBME Group reports Dh487 million net profit the first half of 2023
ADGM grants virtual asset trading license to M2

Saudi Arabia:

Saudi Arabia is largest Islamic finance market with assets over \$830 billion: SAMA chief
Saudi Arabia's crude production at 9.96m bpd in June following OPEC+ cuts: JODI
Saudi Ceer, Siemens partner to propel EV manufacturing

Egypt:

Egypt set to launch sugar trading on commodities exchange
Egypt, China sign 3-year agriculture cooperation plan
Rx Healthcare considers acquiring a pharmaceutical company

South Africa:

SA losses of R4bn in customs limbo
Rand seen getting a boost from better South African power supply
Growthpoint to undertake R1.2bn investment in student housing

India:

GQG picks up 8.1% in Adani Power for \$1.1 billion
Japan retailer Uniqlo looks to boost India sourcing
India's per capita income expected to increase from Rs 2 lakh in FY23 to Rs 14.9 lakh in FY47

Vietnam:

Vietnamese EV maker's market cap hits 85.5 billion USD in Nasdaq debut
Vietnam, Israel hope to hit 3 billion USD in trade: forum
Advanced advertising equipment, technology displayed in HCM City

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,780.79	-0.3%	-1.0%	-0.1%	-4.2%	AED/USD	3.67	0.0%	0.0%
Egypt	18,062.50	0.5%	2.0%	2.7%	23.7%	EGP/USD	30.90	0.0%	25.1%
India	19,465.00	0.2%	0.2%	-1.5%	7.5%	INR/USD	83.28	-0.1%	0.6%
Kenya	1,550.44	-0.8%	-2.7%	-1.7%	-7.5%	KES/USD	144.10	0.2%	16.7%
Nigeria	2,354.71	-0.5%	-1.1%	0.5%	27.8%	NGN/USD	759.86	-2.0%	39.3%
Saudi Arabia	11,392.76	-0.2%	-0.3%	-2.6%	8.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,342.56	-1.0%	-2.9%	-5.8%	3.6%	ZAR/USD	19.19	0.3%	12.7%
Vietnam	1,256.51	1.2%	1.3%	2.1%	25.0%	VND/USD	23,945.00	-0.1%	1.3%

MSCI Emerging Markets

MSCI Frontier	515.32	-0.1%	-0.7%	-0.1%	9.1%	Brent Crude (\$)	83.45	-1.7%	-2.9%
MSCI Frontier 100	1,182.49	-0.1%	-0.5%	0.04%	8.4%	Gold (\$)	1,928.30	-0.4%	5.6%
MSCI Emerging	975.77	-0.6%	-2.2%	-6.8%	2.0%	Copper (\$)	8,167.00	-0.4%	-2.4%
MSCI World (USD)	2,925.63	-0.8%	-1.6%	-4.5%	12.4%	Coffee (\$)	151.31	0.0%	-3.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	10.70	3.9%	4.4%	22.80	Airtel Africa	1250.00	-5.3%	-23.5%	1817.78
Dangote Sugar	34.00	3.0%	111.8%	124.10	Fidelity	7.30	-3.9%	67.8%	108.14
Custodian	7.75	1.3%	30.3%	3.57	FCMB	5.88	-2.8%	52.7%	64.80
United Capital PLC	14.70	0.7%	5.0%	14.34	Access	16.85	-0.6%	98.2%	186.75
FBNH	18.00	0.3%	65.1%	96.28	Guaranty	37.20	-0.5%	61.7%	1552.87
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	5.88	5.88	0.0%	64.80	Cap	19.80	15.25	29.8%	0.20
Zenith	34.45	34.45	0.0%	369.76	Unilever	14.50	10.50	38.1%	6.60
Wema	5.00	5.00	0.0%	19.57	UBN	7.00	4.65	50.5%	1.03
UBA	14.00	14.00	0.0%	315.38	Nestle	1170.00	764.90	53.0%	49.10
UACN	10.70	10.70	0.0%	22.80	International Breweries	4.55	2.70	68.5%	1.66

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.	9.28	3.2%	142.3%	3.95	Abu Dhabi National Co. for Building Materials	0.35	-9.9%	88.5%	0.90
Emirates Driving Company	25.96	2.9%	-2.4%	0.21	Manazel PJSC	0.49	-5.1%	23.0%	12.80
ADNOC Drilling Company PJSC	4.04	1.8%	35.6%	26.56	RAK Co. for White Cement & Const Materials	1.44	-4.0%	-19.6%	0.00
National Marine Dredging Co.	21.00	1.7%	-14.2%	20.88	APEX INVESTMENT	2.34	-2.9%	-33.1%	10.20
National Corporation for Tourism & Hotels	3.00	1.4%	0.0%	0.46	Bayanat AI PLC	4.28	-2.7%	-12.7%	10.31
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	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£)
Juhayna Food Industries	17.04	20.0%	74.1%	51.12	Belton Financial Hld	3.41	-6.3%	186.6%	482.11
Egyptian Iron&Steel	7.40	5.0%	10.0%	3.56	Eastern Tobacco	17.51	-2.7%	22.4%	4.66
Egyptian Kuwaiti Holding-EGP	37.49	3.1%	18.9%	19.37	QALA For Financial Investments	2.20	-2.7%	5.8%	46.57
Egyptian Tourism Resorts	3.00	3.1%	53.1%	5.94	Orascom Hotels	10.86	-1.4%	55.1%	19.01
Ezz Steel	47.29	2.8%	103.4%	53.91	Cleopatra Hospital Company	4.00	-1.2%	-24.8%	41.20
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	15.73	18.43	-14.7%	4.89	T M G Holding	9.66	6.88	40.4%	5.77
Palm Hills Development Company	1.96	2.40	-18.3%	12.83	Egyptian Kuwaiti Holding-EGP	37.49	20.30	84.7%	19.37
Taaleem Management Services	3.70	4.60	-19.6%	4.33	Commercial International Bank	52.87	24.55	115.4%	398.41
QALA For Financial Investments	2.20	3.06	-28.1%	46.57	Misr Fertilizers Production Company	237.39	91.02	160.8%	15.09
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.13	3.17	-32.8%	28.22	Sidi Kerir Petrochemicals	24.50	5.87	317.4%	79.14

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Apollo Hospitals Enterprise Ltd	4946.00	2.6%	10.5%	3266.766	Adani Ports And Sez.	774.85	-1.6%	-5.3%	8913.04
NTPC	217.50	2.1%	30.7%	2088.57	Hindalco Industries	444.00	-1.5%	-6.2%	2240.92
Infosys	1417.90	1.8%	-6.0%	10948.18	HDFC Life Insurance Company Ltd	624.20	-1.4%	10.2%	1122.89
Tata Motors	617.80	1.7%	59.2%	8893.64	Bharti Airtel	856.50	-1.2%	6.3%	3400.54
Power Grid Corp Of India	248.20	1.5%	16.1%	1695.00	Hero Motocorp	2980.00	-1.0%	8.8%	2239.95
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Dr Reddys Lab	5882.25	5916.65	-0.6%	5027.58	UPL	589.00	583.00	1.0%	885.02
ONGC	178.75	180.45	-0.9%	1491.08	HUL	2550.00	2393.00	6.6%	2942.33
Mahindra & Mahindra	1570.00	1594.80	-1.6%	3670.50	Kotak Mahindra Bank	1786.00	1643.50	8.7%	3360.38
Sun Pharma Industries	1145.00	1169.70	-2.1%	1392.82	Coal India	233.20	207.60	12.3%	1067.87
Hcl Technologies	1175.50	1202.60	-2.3%	3026.35	State Bank Of India	565.05	499.35	13.2%	8861.94

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	2.87	2.5%	-4.7%	0.00	Safaricom Plc	15.00	-5.7%	-37.9%	464.44
Kenya Power & Lighting Limited	1.50	1.4%	-3.8%	0.19	East African Breweries Limited	129.75	-3.9%	-22.5%	253.73
NCBA Group Plc	39.00	0.8%	-0.9%	3.65	Nation Media Group	20.00	-2.9%	25.4%	29.94
					Centum Investment Company Plc	8.86	-1.6%	6.0%	0.28
					KCB Group Plc	27.75	-1.2%	-27.2%	14.37
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	163.25	171.00	-4.5%	2.32	KCB Group Plc	27.75	27.75	0.0%	14.37
NCBA Group Plc	39.00	41.70	-6.5%	3.65	Total Kenya Ltd	19.10	18.25	4.7%	0.02
Stanbic Holdings	120.75	129.75	-6.9%	0.66	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	0.09
Absa Bank Kenya	12.05	12.95	-6.9%	1.93	Diamond Trust Bank Limited	46.80	44.00	6.4%	0.12
Nation Media Group	20.00	23.90	-16.3%	29.94	Nairobi Securities Exchange Plc	6.04	5.62	7.5%	0.23

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Ethad Atheeb Telecommunication Co.	96.00	8.1%	104.5%	243.27	Tabuk Agricultural Development Co.	16.38	-3.9%	7.8%	10.05
Al-Baha Investment and Development Co.	0.16	6.7%	-98.6%	4.15	Al-Babtain Power and Telecommunication Co.	30.95	-3.7%	47.7%	16.68
Arabian Contracting Services Co.	220.00	4.9%	105.6%	43.86	Saudi Fisheries Co.	27.70	-3.5%	3.0%	9.32
Middle East Specialized Cables Co.	17.62	4.3%	78.0%	31.47	Saudi Arabian Fertilizer Co.	3.35	-3.2%	-89.6%	6.70
Almunajem Foods Co.	72.60	3.9%	18.2%	93.65	Power & Water Utility Co for Jubail & Yanbu	74.20	-3.0%	58.2%	98.50
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.	89.10	89.10	0.0%	29.56	Abdullah Al Othaim Markets Co.	14.48	14.48	0.0%	21.83
Jamjoom Pharmaceuticals Factory Co.	114.80	114.80	0.0%	33.31	Abdulmohsen Alhokair Group for Tourism and Development	2.31	2.31	0.0%	5.54
Al Mawarid Manpower Co.	132.20	132.20	0.0%	44.41	Al Kathiri Holding Co.	3.00	3.00	0.0%	2.22
Arabian Drilling Co.	187.40	187.40	0.0%	32.64	Al-Baha Investment and Development Co.	0.16	0.16	0.0%	4.15
Americana Restaurants International PLC	4.36	4.36	0.0%	39.68	Alkhabeer REIT Fund	6.67	6.67	0.0%	0.99

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
NEPI Rockcastle NV	11800.00	4.2%	14.5%	56758.00	Investec Ltd	10733.00	-3.9%	-0.2%	8207.95
Absa Group Ltd	17784.00	2.3%	-8.3%	73625.76	Investec PLC	10911.00	-3.9%	1.3%	10518.42
Standard Bank Group Ltd	19360.00	1.4%	15.4%	60984.00	AngloGold Ashanti Ltd	32850.00	-3.8%	-0.2%	37777.50
Northam Platinum Holdings Ltd	12624.00	1.1%	-32.6%	24490.56	Impala Platinum Holdings Ltd	9849.00	-3.2%	-53.8%	45797.85
FirstRand Ltd	7142.00	0.9%	15.0%	81204.54	Naspers Ltd	326513.00	-2.9%	15.6%	346103.78
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	19527.00	19551.00	-0.1%	11584.00	Growthpoint Properties Ltd	1229.00	1220.00	0.6%	8553.84
Rengro Ltd	15619.00	15807.00	-1.2%	22178.98	Mondi PLC	31183.00	30926.00	0.8%	19865.75
Anheuser-Busch InBev SA/NV	105831.00	107701.00	-1.7%	21227.58	Sasol Ltd	24650.00	24429.00	0.9%	35496.00
Bid Corp Ltd	41960.00	42800.00	-2.0%	24261.27	Anglo American PLC	48270.00	47164.00	1.2%	47861.64
Reinet Investments SCA	42778.00	43750.00	-2.2%	4891.66	Nedbank Group Ltd	21270.00	20952.00	1.5%	59556.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vingroup JSC	75600.00	6.9%	40.5%	1.467.731,49	Vietjet Aviation	100800.00	-1.1%	-7.9%	75.205,33
Sai Gon Thuong Tin Commercial	32900.00	4.4%	46.2%	1.449.898,26	Masan Group Corp	81800.00	-0.7%	-12.0%	152.627,24
Techcombank	35300.00	3.7%	36.6%	461.073,70	BaoViet Holdings	46900.00	-0.6%	0.6%	24.909,18
Vinhomes	62900.00	1.9%	31.0%	401.014,41	Vietnam Rubber Group JSC	21350.00	-0.5%	54.7%	43.631,58
Vietnam Prosperity	22400.00	1.8%	25.1%	876.523,33	PetroVietnam Power Corp	12900.00	-0.4%	21.1%	216.719,47
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%	34.471,60	No Va Land Invest	40250.00	40250.00	0.0%	40.664,20
Bank for Inv. and Devp	47500.00	49950.00	-4.9%	64.079,39	Phat Dat Real Estate Development Corp	13900.00	13900.00	0.0%	115.932,82
Vietcombank	89200.00	96000.00	-7.1%	64.826,11	Saigon Beer Alcohol Beverage Corp.	29500.00	29500.00	0.0%	29.894,37
Sai Gon Thuong Tin Commercial	32900.00	36700.00	-10.4%	1.449.898,26	Vietjet Aviation	100800.00	100800.00	0.0%	75.205,33
Vincom Retail	31500.00	37000.00	-14.9%	373.705,89	BaoViet Holdings	46900.00	46600.00	0.6%	24.909,18

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