

# Daily Market Report

18 August 2023

## JSE

JSE All-Share Index declined by 0.72% and closed at 74,375.25 points on Thursday, as the Resources and Financial sectors recorded losses.

## BRVM

BRVM Composite Index decreased by 0.37% and closed at 205.97 points on Thursday, with Saph Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top losers.

## NSE

NGX All-Share Index decreased by 0.27% to close at 64,448.96 on Thursday, as the Banking and Industrial sectors recorded losses.

## EGX

EGX 30 Index decreased by 0.52% and closed at 17,969.27 points on Thursday, as the market lost LE 5 billion of market cap, amid Arab and foreign selling.

## ESG

Casablanca ESG 10 Index decreased by 0.38% to close at 898.62 points on Thursday.

## Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	0.72%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.37%
<b>NGX</b> Nigerian Stock Exchange	▼	0.27%
<b>EGX</b> Egyptian Stock Exchange	▼	0.52%
<b>ESG</b> Casablanca Stock Exchange	▼	0.38%

## African Markets

**Nigeria:** NGX 30 Index decreased by 0.26% to close at 2,348.61 points on Thursday. United Capital and Zenith were the top losers.

**Egypt:** EGX 30 Index decreased by 0.52% and closed at 17,969.27 points on Thursday, as the market lost LE 5 billion of market cap, amid Arab and foreign selling.

**Kenya:** NSE 20 Index was down by 0.18% and closed at 1,547.58 points on Thursday. Stanbic Holdings and WPP Scangroup Plc were the top losers.

**South Africa:** JSE Top 40 Index declined by 0.67% and closed at 68,878.75 points on Thursday, as the Resources and Financial sectors recorded losses.

## Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 740.67
<b>INTERBANK RATES</b>	
OPR	21.42 ▲
Overnight	21.40 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX Index decreased marginally by 0.03% to close at 9,777.87 points on Thursday, as losses in the Real Estate, Financial, and Health Care sectors pushed shares lower. MSCI UAE decreased by 0.25% to close at 398.36 points.

**Vietnam:** VN-30 Index declined by 0.73% to close at 1,247.82 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam declined by 1.09% to close at 755.09 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.51% to close at 11,451.31 points on Thursday, as gains in the Banks and Food & Staples Retailing sectors led shares higher. MSCI Saudi Arabia increased by 0.62% and closed at 1,481.65 points.

**India:** Nifty 50 Index decreased by 0.51% to close at 19,365.25 points on Thursday, as losses in the IT, Realty, and Oil & Gas sectors pushed shares lower. MSCI India decreased by 0.40% to close at 2,172.47 points.

## News

### Nigeria:

Naira gains at official market, trades 740.67/\$  
Aradel Holdings grows revenue by 218%  
Nigeria vital to global green energy transition  
– Miners

### Kenya:

Co-operative Bank's First-Half Profit After Tax rises to Sh12.1B  
Peter Kenneth bank among firms hit by Sh1.1bn tax demand  
Sanlam posts Sh171m loss on portfolio decline, taxes

### Abu Dhabi:

Abu Dhabi's ADNOC Gas signs 5-year LNG supply deal with Japex  
Dubai logs over \$653mln in realty transactions Thursday  
Abu Dhabi's TAQA evaluating upto \$2.5 billion investment in Adani's power business

### Saudi Arabia:

Saudi Arabia, China ink \$1.33bn worth of cooperation deals  
Saudi Arabia's main index ends week in green as trading turnover hits \$1.69bn  
Agricultural Development Fund and GASTAT forge data-sharing collaboration

### Egypt:

Egypt, Turkey sign MoU to enhance medical tourism cooperation  
ITIDA, GIZ sign MoU to develop Egypt's IT sector  
Agricultural Bank of Egypt Obtains Funding Worth Egp 3.583Bn From Msmeda

### South Africa:

Standard Bank profits jump 35%  
Brics bank raises R1.5bn in first SA bond auction  
SA roads too expensive for Exxaro coal exports

### India:

RBI launches portal Udgam for unclaimed deposit search  
HDFC Group launches life insurance, asset management services from GIFT IFSC  
JPMorgan Index may include India bonds in 2024, Pictet says

### Vietnam:

Dong Nai's industrial parks lure nearly 780 million USD in FDI  
Vietnamese products impressive at Singapore's Franchising & Licensing Asia  
Economic diplomacy to be promoted to fuel agricultural development

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,777.87	-0.03%	-1.0%	-0.1%	-4.2%	AED/USD	3.67	0.0%	0.0%
Egypt	17,969.27	-0.5%	1.5%	2.1%	23.1%	EGP/USD	30.89	0.0%	25.0%
India	19,365.25	-0.5%	-0.3%	-2.0%	7.0%	INR/USD	83.10	-0.2%	0.4%
Kenya	1,547.58	-0.2%	-2.9%	-1.9%	-7.7%	KES/USD	144.20	0.1%	16.8%
Nigeria	2,348.61	-0.3%	-1.3%	0.2%	27.5%	NGN/USD	740.67	-2.6%	37.7%
Saudi Arabia	11,451.31	0.5%	0.2%	-2.1%	9.3%	SAR/USD	3.75	0.0%	-0.2%
South Africa	68,878.75	-0.7%	-3.6%	-6.5%	2.9%	ZAR/USD	19.07	-0.6%	12.0%
Vietnam	1,247.82	-0.7%	0.6%	1.4%	24.1%	VND/USD	23,865.00	-0.3%	1.0%

## MSCI Emerging Markets

MSCI Frontier	512.00	-0.6%	-1.3%	-0.7%	8.4%	Brent Crude (\$)	84.12	0.8%	-2.1%
MSCI Frontier 100	1,176.85	-0.5%	-1.0%	-0.4%	7.9%	Gold (\$)	1,915.20	-0.7%	4.9%
MSCI Emerging	973.86	-0.2%	-2.4%	-7.0%	1.8%	Copper (\$)	8,235.50	0.8%	-1.6%
MSCI World (USD)	2,901.84	-0.8%	-2.4%	-5.3%	11.5%	Coffee (\$)	149.07	-1.2%	-4.5%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Sugar	35.50	4.4%	121.2%	104.78	Nascon	35.00	-5.1%	215.3%	9.28
FBNH	18.65	3.6%	71.1%	353.48	UBN	6.90	-1.4%	7.8%	4.31
International Breweries	4.70	3.3%	0.0%	2.45	United Capital PLC	14.50	-1.4%	3.6%	17.19
Fidelity	7.50	2.7%	72.4%	595.54	Zenith	34.00	-1.3%	41.7%	248.12
Sterling	3.64	1.4%	160.0%	29.19	Access	16.70	-0.9%	96.5%	275.94
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	5.90	5.90	0.0%	67.00	Cap	19.80	15.25	29.8%	7.17
Zenith	34.00	34.00	0.0%	248.12	Unilever	14.50	10.50	38.1%	1.53
Wema	5.00	5.00	0.0%	6.74	UBN	6.90	4.65	48.4%	4.31
UBA	13.95	13.95	0.0%	340.02	Nestle	1170.00	764.90	53.0%	4.45
UACN	10.70	10.70	0.0%	1.36	Custodian	7.75	4.55	70.3%	0.77

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Union Insurance Company	0.64	14.9%	1.4%	0.00	Ras Al Khaimah Poultry & Feeding	1.44	-10.0%	-10.6%	0.00
National Corporation for Tourism & Hotels	3.25	8.3%	8.3%	3.18	National Bank of Umm Al Qaiwain	1.80	-10.0%	0.6%	0.05
Sharjah Cement and Industrial Development Co.	0.66	6.0%	6.8%	0.00	RAK Co. for White Cement & Constr Materials	1.35	-6.3%	-24.6%	0.04
Abu Dhabi National Hotels Co.	9.80	5.6%	155.9%	29.59	FOODCO NATIONAL FOODSTUFF PrJSC	1.70	-4.0%	-32.5%	0.04
RAK Properties	1.15	5.5%	69.1%	26.63	BURJEEL HOLDINGS	2.64	-2.2%	16.3%	13.33
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
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£)
Misr El Gadida for Housing and Development	12.35	1.3%	55.2%	81.88	Juhayna Food Industries	15.70	-7.9%	60.4%	5.51
Belton Financial Hld	3.44	0.9%	189.1%	361.34	T M G Holding	9.31	-3.6%	-6.8%	15.92
BPE Financial	19.60	0.8%	18.3%	13.28	Cairo For Investment And Real Estate Development	10.18	-2.9%	-21.7%	2.30
Alexandria Containers&goods	27.00	0.7%	45.2%	17.22	SODIC	18.38	-1.8%	21.5%	0.47
Credit Agricole Egypt	14.80	0.5%	74.9%	8.77	Oriental Weavers	15.45	-1.8%	48.6%	10.92
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	15.45	18.43	-16.2%	10.92	T M G Holding	9.31	6.88	35.3%	15.92
Palm Hills Development Company	1.95	2.40	-18.6%	9.09	Egyptian Kuwaiti Holding-EGP	37.39	20.30	84.2%	49.72
Taallem Management Services	3.71	4.60	-19.3%	9.01	Commercial International Bank	52.80	24.55	115.1%	181.10
QALA For Financial Investments	2.17	3.06	-29.1%	36.61	Misr Fertilizers Production Company	233.61	91.02	156.7%	10.31
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.11	3.17	-33.4%	36.40	Sidi Kerir Petrochemicals	24.40	5.87	315.7%	41.48

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	810.50	4.4%	-0.9%	11160.134	ITC	440.95	-2.1%	33.0%	7190.17
Titan Company	3071.50	2.0%	18.2%	5196.99	LTIMINDTREE LIMITED	5091.00	-2.1%	16.6%	1757.96
Adani Enterprises Limited	2477.50	1.3%	-35.8%	19133.52	Power Grid Corp Of India	243.50	-1.8%	13.9%	2802.17
State Bank Of India	571.75	1.1%	-6.8%	15875.30	Reliance Industries	2534.05	-1.6%	-0.5%	17439.63
Bajaj Auto	4652.05	1.1%	28.7%	1440.00	Larsen & Toubro	2649.00	-1.6%	27.0%	4328.25
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Mahindra & Mahindra	1568.75	1594.80	-1.6%	3735.24	UPL	585.00	583.00	0.3%	1063.72
ONGC	177.45	180.45	-1.7%	925.02	HUL	2537.00	2393.00	6.0%	3904.09
Larsen & Toubro	2649.00	2695.00	-1.7%	4328.25	Kotak Mahindra Bank	1767.00	1643.50	7.5%	9104.78
Hcl Technologies	1174.95	1202.60	-2.3%	2738.39	Coal India	232.25	207.60	11.9%	1300.53
Sun Pharma Industries	1142.45	1169.70	-2.3%	2246.72	State Bank Of India	571.75	499.35	14.5%	15875.30

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	15.95	6.3%	-34.0%	112.02	Stanbic Holdings	115.00	-4.8%	12.7%	5.77
East African Breweries Limited	132.50	2.1%	-20.9%	0.94	WPP Scangroup Plc	2.80	-2.4%	-7.0%	0.01
Bamburi Cement Limited	25.40	1.6%	-19.4%	0.29	Standard Chartered Bank Kenya Ltd	159.50	-2.3%	11.7%	1.83
Nairobi Securities Exchange Plc	6.08	0.7%	-10.3%	0.06	Kenya Power & Lighting Limited	1.47	-2.0%	-5.8%	0.20
Total Kenya Ltd	19.15	0.3%	-19.7%	0.06	Kengen Limited	2.32	-1.7%	-28.0%	0.31
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)
NCBA Group Plc	38.95	41.70	-6.6%	0.98	KCB Group Plc	27.65	27.65	0.0%	7.04
Standard Chartered Bank Kenya Ltd	159.50	171.00	-6.7%	1.83	Total Kenya Ltd	19.15	18.25	4.9%	0.06
Absa Bank Kenya	11.95	12.95	-7.7%	3.29	British American Tobacco Kenya Ltd	424.50	400.00	6.1%	1.10
Stanbic Holdings	115.00	129.75	-11.4%	5.77	Diamond Trust Bank Limited	46.85	44.00	6.5%	0.87
Nation Media Group	20.00	23.90	-16.3%	0.16	Kengen Limited	2.32	2.15	7.9%	0.31

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Baha Investment and Development Co.	0.17	6.3%	-98.5%	4.97	Americana Restaurants International PLC	4.16	-4.6%	38.7%	65.82
Saudi Paper Manufacturing Co.	32.50	4.8%	40.0%	13.87	National Agricultural Marketing Co.	26.85	-3.8%	56.1%	15.39
Saudi Steel Pipe Co.	33.85	3.8%	89.1%	69.48	SICO Saudi REIT Fund	5.25	-3.5%	-6.2%	1.56
Mouwasset Medical Services Co.	109.80	3.2%	-47.5%	40.74	Musharaka REIT Fund	6.59	-3.4%	-25.5%	3.24
Riyadh Cables Group Co.	70.00	3.1%	88.4%	37.59	National Gas and Industrialization Co.	64.00	-3.3%	23.6%	16.31
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.	87.00	87.00	0.0%	62.77	Abdullah Al Othaim Markets Co.	14.62	14.62	0.0%	13.55
Jamjoom Pharmaceuticals Factory Co.	113.20	113.20	0.0%	35.44	Abdulmohsen Alhokair Group for Tourism and Development	2.30	2.30	0.0%	10.56
Al Mawarid Manpower Co.	134.40	134.40	0.0%	55.96	Al Kathiri Holding Co.	2.98	2.98	0.0%	3.26
Arabian Drilling Co.	188.40	188.40	0.0%	21.84	Al-Baha Investment and Development Co.	0.17	0.17	0.0%	4.97
Power & Water Utility Co for Jubail & Yanbu	72.90	72.90	0.0%	112.18	Alkhabeer REIT Fund	6.63	6.63	0.0%	0.93

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American PLC	48843.00	1.3%	-26.4%	56169.45	Gold Fields Ltd	21730.00	-11.5%	23.4%	111257.60
MultiChoice Group	8444.00	1.1%	-28.0%	13594.84	AngloGold Ashanti Ltd	31495.00	-4.1%	-4.3%	71178.70
Sasol Ltd	24916.00	1.1%	-7.5%	31892.48	Growthpoint Properties Ltd	1187.00	-3.4%	-18.4%	16499.30
BHP Group Ltd	53884.00	1.1%	2.3%	42897.59	Anglo American Platinum Ltd	66840.00	-3.4%	-53.1%	36447.85
Glencore PLC	10280.00	1.1%	-9.9%	32587.60	Impala Platinum Holdings Ltd	9609.00	-2.4%	-54.9%	61978.05
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	19348.00	19562.00	-1.1%	15631.06	Mondi PLC	31057.00	30939.00	0.4%	25718.30
Rengro Ltd	15597.00	15863.00	-1.7%	18872.37	Growthpoint Properties Ltd	1187.00	1181.00	0.6%	16499.30
Bid Corp Ltd	41936.00	42654.00	-1.7%	20605.67	Nedbank Group Ltd	20856.00	20700.00	0.8%	76541.52
Reinet Investments SCA	42741.00	43899.00	-2.6%	7291.19	Anglo American PLC	48843.00	48351.00	1.2%	56169.45
Anheuser-Busch InBev SA/NV	105275.00	109200.00	-3.6%	33986.98	Sasol Ltd	24916.00	24514.00	1.6%	31892.48

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	29950.00	3.8%	69.2%	1.774.343,76	Vingroup JSC	71900.00	-4.9%	33.6%	1.648.257,50
FPT Corp	86000.00	1.1%	11.8%	319.142,19	Vinhomes	61000.00	-3.0%	27.1%	334.815,85
Vietnam JSC Bank	32600.00	0.8%	19.6%	318.606,04	Vincom Retail	30600.00	-2.9%	16.3%	305.435,82
Phat Dat Real Estate Development Corp	14000.00	0.7%	2.9%	209.051,01	Techcombank	34700.00	-1.7%	34.2%	185.710,64
Vinamilk	73600.00	0.7%	-3.3%	339.005,49	Tien Phong Commercial Joint Stock Bank	18850.00	-1.3%	-10.5%	110.795,11
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	155700.00	155700.00	0.0%	50.934,55	BaoViet Holdings	46500.00	46500.00	0.0%	31.579,15
Bank for Inv. and Devp	47100.00	49950.00	-5.7%	79.114,66	No Va Land Invest	39750.00	39750.00	0.0%	64.617,18
Vietcombank	89400.00	96000.00	-6.9%	191.693,48	Phat Dat Real Estate Development Corp	14000.00	14000.00	0.0%	209.051,01
Sai Gon Thuong Tin Commercial	32350.00	36700.00	-11.9%	483.718,67	Saigon Beer Alcohol Beverage Corp.	29400.00	29400.00	0.0%	36.507,68
Vietnam JSC Bank	32600.00	38200.00	-14.7%	318.606,04	Vietjet Aviation	100000.00	100000.00	0.0%	96.210,15

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