

Daily Market Report

31 August 2023

JSE

JSE All-Share Index increased by 0.64% and closed at 75,256.19 points on Wednesday, as the Resources and Financial sectors recorded gains.

BRVM

BRVM Composite Index increased by 0.38% and closed at 207.23 points on Wednesday, with Setao Côte d'Ivoire and Safca Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index inched down by 0.08% to close at 66,439.53 on Wednesday, as the Banking and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index jumped by 1.01% and closed at 18,818.15 points on Wednesday, as the market gained LE 6 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index inched down by 0.09% to close at 892.90 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.64%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.38%
NGX Nigerian Stock Exchange	▼	0.08%
EGX Egyptian Stock Exchange	▲	1.01%
ESG Casablanca Stock Exchange	▼	0.09%

African Markets

Nigeria: NGX 30 Index decreased by 0.40% to close at 2,447.11 points on Wednesday. Transcorp and Sterling were the top losers.

Egypt: EGX 30 Index jumped by 1.01% and closed at 18,818.15 points on Wednesday, as the market gained LE 6 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.36% and closed at 1,532.39 points on Wednesday. Total Kenya Ltd and The Cooperative Bank of Kenya Ltd were the top gainers.

South Africa: JSE Top 40 Index increased by 0.61% and closed at 69,516.13 points on Wednesday, as the Resources and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 738.18
INTERBANK RATES	
OPR	2.58 ▲
Overnight	3.00 ▼

Other Emerging Markets

Abu Dhabi: ADX Index was down by 0.18% to close at 9,744.22 points on Wednesday, as losses in the Telecommunications, Financials, and Industrials sectors pushed shares lower. MSCI UAE inched down by 0.02% to close at 397.44 points.

Vietnam: VN-30 Index increased by 0.83% to close at 1,225.56 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.21% to close at 727.41 points.

Saudi Arabia: Tadawul All Share Index jumped by 1.16% to close at 11,574.75 points on Wednesday, as gains in the Energy, Transportation, and Media and Entertainment sectors led shares higher. MSCI Saudi Arabia increased by 1.03% and closed at 1,495.49 points.

India: Nifty 50 Index inched up by 0.02% to close at 19,347.45 points on Wednesday, as gains in the IT, Metal, and Auto sectors led shares higher. MSCI India increased by 0.25% to close at 2,188.03 points.

News

Nigeria:

NGX Group to pay shareholders N495m interim dividend
Access Pensions surpasses N1tn assets under management
NCDMB, BOI sign new MoU

Kenya:

Kenya banks' lending to parent firms abroad up 61pc
National Oil eyes Sh5bn from investor in fuel stations deal
KMRC taps Sh3bn AfDB, World Bank loans

Abu Dhabi:

Dubai firms defy regional downtrend with 29% Q2 profit surge
UAE's non-oil trade hits record \$340B in first half of 2023
GCC-listed firms aggregate Q2 net falls 6.2pc to \$57.9bn: Kamco

Saudi Arabia:

ACWA Power's solar project in Egypt closes \$123m financing
RCU launches urban development plan for two AIUla regions
Saudi's Energy Capital invests in US battery maker Pure Lithium

Egypt:

Egypt wants to raise \$5B from its IPO program by mid-2024
Egypt carries out \$1.9B plan to drill 45 natural gas wells
Indorama aims to establish \$700M factories in Egypt

South Africa:

Woolies delivers record earnings after Australian disaster
SA farmers thrown a lifeline amid load shedding with R1.2bn Agro-Energy Fund
Sibanye-Stillwater cuts production guidance of gold, nickel and PGM

India:

India's economic growth set to accelerate to its fastest in a year
LPG cut: Rs 18,500 crore relief to buyers
India's fintech ecosystem to reach \$70 billion in annual revenue by FY30: Report

Vietnam:

HCM City's industrial production index up 6.6% in August
Over 416 million USD invested abroad in 8 months
Infrastructure projects help attract industrial investments to Mekong Delta:

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,744.22	-0.2%	-0.2%	-0.4%	-4.6%	AED/USD	3.67	0.0%	0.0%
Egypt	18,818.15	1.0%	3.4%	6.9%	28.9%	EGP/USD	30.91	-0.1%	25.1%
India	19,347.45	0.02%	0.4%	-2.1%	6.9%	INR/USD	82.70	0.2%	-0.1%
Kenya	1,532.39	0.4%	0.7%	-2.8%	-8.6%	KES/USD	145.40	0.1%	17.7%
Nigeria	2,447.11	-0.4%	1.5%	4.4%	32.8%	NGN/USD	738.18	-5.0%	37.5%
Saudi Arabia	11,574.75	1.2%	1.5%	-1.0%	10.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,516.13	0.6%	2.0%	-5.6%	3.8%	ZAR/USD	18.70	1.2%	9.9%
Vietnam	1,225.56	0.8%	2.6%	-0.4%	21.9%	VND/USD	24,130.00	-0.2%	2.1%

MSCI Emerging Markets

MSCI Frontier	508.21	0.4%	1.3%	-1.5%	7.6%	Brent Crude (\$)	85.86	0.4%	-0.1%
MSCI Frontier 100	1,170.68	0.3%	1.4%	-1.0%	7.3%	Gold (\$)	1,973.00	0.4%	8.0%
MSCI Emerging	988.30	0.1%	1.8%	-5.6%	3.3%	Copper (\$)	8,472.50	0.3%	1.2%
MSCI World (USD)	2,991.52	0.5%	2.7%	-2.4%	14.9%	Coffee (\$)	151.91	0.1%	-2.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nascon	56.05	3.6%	405.0%	391.60	Transnational Corporation	6.31	-10.0%	458.4%	2146.93
International Breweries	4.60	2.2%	-2.1%	11.68	UACN	10.35	-2.4%	1.0%	12.49
Lafarge Africa	29.10	2.1%	21.3%	130.28	Sterling	3.32	-2.4%	137.1%	12.26
Dangote Sugar	58.30	1.5%	263.2%	1454.76	Custodian	7.50	-2.0%	26.1%	3.98
UBA	13.80	0.7%	81.6%	150.36	Zenith	32.90	-1.8%	37.1%	371.08
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	5.70	5.70	0.0%	41.10	Unilever	14.00	10.50	33.3%	103.23
Zenith	32.90	32.90	0.0%	371.08	Cap	20.95	15.25	37.4%	0.53
Wema	4.96	4.96	0.0%	10.14	UBN	6.50	4.65	39.8%	0.82
UBA	13.80	13.80	0.0%	150.36	Nestle	1100.00	764.90	43.8%	348.38
Transnational Corporation	6.31	6.31	0.0%	2146.93	Nigerian Breweries	39.00	24.40	59.8%	47.30

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Oman & Emirates Investment Holding Co	0.41	14.9%	7.9%	0.00	Fujairah Cement Industries	0.37	-7.3%	-23.2%	0.00
Waha Capital Company	1.72	2.4%	26.5%	9.60	Gulf Cement Co.	0.43	-7.1%	-16.9%	0.00
Al Seer Marine Supplies & Equipment Company P.J.S.C	7.90	1.9%	-16.1%	14.37	Abu Dhabi National Takaful Co.	8.02	-5.7%	24.5%	0.00
Response Plus Holding PrJSC	4.56	1.8%	-26.3%	7.14	HILY HOLDING PJSC	2.95	-4.8%	-9.2%	0.01
BURJEEL HOLDINGS PLC	2.84	1.8%	25.1%	25.85	Multiply Group PJSC	3.81	-4.0%	-17.9%	113.89
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 Ain Alahlia Insurance Co.	37.00	37.00	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Al Buhaira National Insurance Company	2.87	2.87	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	0.0%	0.00
Oman & Emirates Investment Holding Co	0.41	0.41	0.0%	0.00	Invest Bank	0.45	0.45	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£)
Egyptian Iron&Steel	8.97	4.9%	33.3%	30.05	Orascom Construction	119.00	-3.4%	24.0%	53.37
Commercial International Bank (Egypt)	55.90	3.3%	34.8%	346.58	Alexandria Containers&goods	27.87	-3.3%	49.8%	10.84
Heliopolis Housing	12.30	2.5%	-18.7%	120.54	Belton Financial Hld	3.26	-2.4%	173.9%	146.44
Edita Food Industries S.A.E	21.21	2.2%	52.7%	28.85	Cleopatra Hospital	3.91	-2.3%	-69.9%	16.42
Eastern Tobacco	20.43	2.0%	42.8%	5.57	Qalaa Holdings	2.28	-2.2%	9.6%	67.69
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£)
Sidi Kerir Petrochemicals - SIDPEC	25.40	25.79	-1.5%	16.68	Cleopatra Hospital Company	3.91	3.81	2.6%	16.42
Orascom Construction PLC	119.00	129.00	-7.8%	53.37	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.13	1.62	31.5%	50.10
Telecom Egypt	26.70	28.99	-7.9%	14.70	E-finance For Digital and Financial Investments	17.90	13.22	35.4%	2.08
Misir Fertilizers Production Company - Mopco	235.89	270.00	-12.6%	7.27	Taaleem Management Services	3.75	2.72	37.9%	0.01
Oriental Weavers	15.67	18.43	-15.0%	9.28	T M G Holding	10.80	6.88	57.0%	135.43

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Maruti Suzuki India	9790.00	1.8%	16.6%	5289.461	Bharat Petroleum	351.50	-1.5%	6.4%	1709.64
Eicher Motors	3396.95	1.2%	5.2%	3065.82	Power Grid Corp Of India	247.40	-1.5%	15.8%	1255.13
Mahindra & Mahindra	1579.40	1.2%	26.4%	4962.55	Hero Motocorp	2945.60	-1.4%	7.5%	1240.10
Tata Consumer products ltd.	848.00	1.2%	10.6%	511.85	Dr Reddys Lab	5649.00	-1.3%	33.3%	4043.46
Infosys	1433.40	1.1%	-5.0%	4395.33	State Bank Of India	567.50	-1.3%	-7.5%	8739.59
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Axis Bank	981.00	998.00	-1.7%	8953.79	UPL	599.25	576.95	3.9%	2248.96
Tata Steel	122.05	124.30	-1.8%	6279.51	HUL	2532.35	2393.00	5.8%	3106.98
Larsen & Toubro	2710.80	2766.80	-2.0%	5238.92	Kotak Mahindra Bank	1770.00	1643.50	7.7%	4627.57
Maruti Suzuki India	9790.00	10036.95	-2.5%	5289.46	Coal India	228.70	207.60	10.2%	937.23
ONGC	175.85	180.45	-2.5%	1045.20	Reliance Industries	2419.40	2180.00	11.0%	14764.52

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	20.35	10.0%	-14.7%	0.02	Kengen Limited	2.21	-3.9%	-31.4%	1.25
The Cooperative Bank of Kenya Ltd	11.60	2.7%	-5.7%	1.23	WPP Scangroup Plc	2.76	-1.8%	-8.3%	0.02
Centum Investment Company Plc	9.00	1.8%	7.7%	0.21	Kenya Reinsurance Corporation Ltd	1.80	-1.1%	-1.6%	7.77
East African Breweries Limited	134.75	1.5%	-19.6%	1.15					
Absa Bank Kenya	11.50	1.3%	-6.5%	1.43					
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	39.05	41.70	-6.4%	20.48	KCB Group Plc	23.75	23.00	3.3%	13.54
Standard Chartered Bank Kenya Ltd	160.00	171.00	-6.4%	7.47	British American Tobacco Kenya Ltd	419.50	400.00	4.9%	1.05
Absa Bank Kenya	11.50	12.95	-11.2%	1.43	Nairobi Securities Exchange Plc	6.00	5.62	6.8%	0.16
Stanbic Holdings	114.00	129.75	-12.1%	0.23	WPP Scangroup Plc	2.76	2.57	7.4%	0.02
Nation Media Group	20.10	23.90	-15.9%	0.08	Diamond Trust Bank Limited	47.70	44.00	8.4%	1.47

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Fawaz Abdulaziz Alhokair Co.	20.24	10.0%	30.1%	134.52	Al-Baha Investment and Development Co.	0.16	-5.9%	-98.6%	1.80
Electrical Industries Co.	44.90	9.8%	91.1%	96.60	Saudi Airlines Catering Co.	109.00	-2.9%	45.3%	61.75
Arriyadh Development Co.	20.52	8.5%	13.5%	36.47	Development Works Food Co.	115.60	-2.2%	-24.8%	12.15
Saudi Re for Cooperative Reinsurance Co.	20.50	6.3%	49.6%	44.27	Saudi Arabian Amiantit Co.	43.85	-1.5%	34.9%	4.33
Elm Co.	850.00	6.0%	156.0%	267.84	Aldawaa Medical Services Co.	95.70	-1.2%	33.1%	23.49
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.	84.00	84.00	0.0%	48.46	Abdullah Al Othaim Markets Co.	14.38	14.38	0.0%	17.50
Jamjoom Pharmaceuticals Factory Co.	116.80	116.80	0.0%	19.09	Abdulmohsen Alhokair Group for Tourism and Development	2.33	2.33	0.0%	9.10
Al Mawarid Manpower Co.	131.20	131.20	0.0%	58.67	Al Kathiri Holding Co.	3.08	3.08	0.0%	9.19
Arabian Drilling Co.	187.80	187.80	0.0%	26.72	Al-Baha Investment and Development Co.	0.16	0.16	0.0%	1.80
Americana Restaurants International PLC	4.40	4.40	0.0%	43.42	Alkhabeer REIT Fund	6.60	6.60	0.0%	0.61

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Bid Corp Ltd	43300.00	7.3%	31.3%	67115.00	Mr Price Group Ltd	13031.00	-8.1%	-18.0%	79619.41
Gold Fields Ltd	24823.00	4.1%	40.9%	53617.68	Aspen Pharmacare Holdings Ltd	17135.00	-7.9%	25.7%	43522.90
AngloGold Ashanti Ltd	33034.00	3.4%	0.3%	56488.14	Glencore PLC	9766.00	-3.2%	-14.4%	72366.06
Investec Ltd	11154.00	2.6%	3.8%	6948.83	Sibanye Stillwater Ltd	2930.00	-2.5%	-34.5%	65602.70
Mondi PLC	31149.00	2.5%	7.0%	7524.66	Impala Platinum Holdings Ltd	10307.00	-1.9%	-51.6%	39063.53
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)
Anheuser-Busch InBev SA/NV	107809.00	107843.00	-0.03%	31085.65	Growthpoint Properties Ltd	1211.00	1204.00	0.6%	5485.83
Rengro Ltd	15939.00	15983.00	-0.3%	14466.24	Nedbank Group Ltd	21764.00	21500.00	1.2%	28075.56
Bid Corp Ltd	43300.00	43510.00	-0.5%	67115.00	Anglo American PLC	49244.00	48995.00	1.2%	40436.22
Reinet Investments SCA	40831.00	41599.00	-1.8%	5579.56	Sasol Ltd	24750.00	24350.00	1.6%	29700.00
Aspen Pharmacare Holdings Ltd	17135.00	19501.00	-12.1%	43522.90	Mondi PLC	31149.00	30500.00	2.1%	7524.66

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
FPT Corp	96600.00	3.2%	25.6%	226769.41	Vingroup JSC	62000.00	-2.2%	15.2%	1515176.04
Tien Phong Commercial Joint Stock Bank	19550.00	2.9%	-7.1%	425044.48	Vietjet Aviation	96900.00	-0.6%	-11.5%	81221.38
Vietnam JSC Bank	32100.00	2.7%	17.8%	235740.46	Petrovietnam Gas	99300.00	-0.6%	-2.2%	42286.55
Sai Gon Thuong Tin Commercial	32500.00	2.4%	44.4%	876219.87	Masan Group Corp	79600.00	-0.5%	-14.4%	125881.88
Asia Commercial JS Bank	22450.00	1.8%	2.5%	161142.32	Vietnam Prosperity	20800.00	-0.2%	16.2%	194062.39
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	159800.00	159800.00	0.0%	44697.24	BaoViet Holdings	45050.00	45050.00	0.0%	20445.01
FPT Corp	96600.00	97944.43	-1.4%	226769.41	No Va Land Invest	38400.00	38400.00	0.0%	30970.15
Vietcombank	89100.00	96000.00	-7.2%	120437.17	Phat Dat Real Estate Development Corp	12700.00	12700.00	0.0%	69478.69
Bank for Inv. and Devp	46200.00	49950.00	-7.5%	51959.51	Saigon Beer Alcohol Beverage Corp.	28100.00	28100.00	0.0%	39705.09
Sai Gon Thuong Tin Commercial	32500.00	36700.00	-11.4%	876219.87	Vietjet Aviation	96900.00	96900.00	0.0%	81221.38

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