

Daily Market Report

1 September 2023

JSE

JSE All-Share Index decreased by 0.40% and closed at 74,953.73 points on Thursday, as the Financial and Industrial sectors recorded losses.

BRVM

BRVM Composite Index increased by 0.28% and closed at 207.82 points on Thursday, with Sicom Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was up by 0.16% to close at 66,548.99 on Thursday, as the Banking and Oil & Gas sectors recorded gains.

EGX

EGX 30 Index increased by 0.30% and closed at 18,873.82 points on Thursday, as the market gained LE 3 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.46% to close at 897.02 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.40%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.28%
NGX Nigerian Stock Exchange	▲	0.16%
EGX Egyptian Stock Exchange	▲	0.30%
ESG Casablanca Stock Exchange	▲	0.46%

African Markets

Nigeria: NGX 30 Index increased marginally by 0.03% to close at 2,447.85 points on Thursday. Seplat and Stanbic IBTC were the top gainers.

Egypt: EGX 30 Index increased by 0.30% and closed at 18,873.82 points on Thursday, as the market gained LE 3 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.51% and closed at 1,540.16 points on Thursday. Kengen Limited and Kenya Reinsurance Corporation Ltd were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.34% and closed at 69,278.44 points on Thursday, as the Financial and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 762.71
INTERBANK RATES	
OPR	1.90 ▼
Overnight	2.60 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.68% to close at 9,810.21 points on Thursday, as gains in the Consumer Staples, Financials, and Industrials sectors led shares higher. MSCI UAE declined by 0.63% to close at 394.93 points.

Vietnam: VN-30 Index increased by 0.73% to close at 1,234.53 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.76% to close at 732.91 points.

Saudi Arabia: Tadawul All Share Index declined by 0.72% to close at 11,491.20 points on Thursday, as losses in the Energy, Transportation, and Media and Entertainment sectors pushed shares lower. MSCI Saudi Arabia declined by 0.89% and closed at 1,482.19 points.

India: Nifty 50 Index decreased by 0.48% to close at 19,253.80 points on Thursday, as losses in the FMCG, Oil & Gas, and Bank sectors led shares lower. MSCI India decreased by 0.41% to close at 2,179.04 points.

News

Nigeria:

Flour Mills records N1.54tn revenue
FG, states, LGs share N4.37tn in six months – NEITI
MTN Nigeria's Commercial Paper Records 146% Subscription

Kenya:

Airtel Uganda Targets to Raise \$216 Million in IPO
CBK Accepts Bids Worth KSh 23.1 Billion At Weekly T-Bills Auction
StanChart sets Sh145,000 capital limit for offshore investments

Abu Dhabi:

UAE's non-oil trade hits record high of \$337.6bn in H1
Abu Dhabi's US \$3bn Midfield Terminal Building to open in November
Abu Dhabi petrochemicals giant Borouge signs off on Dh2.38b H1-2023 dividend

Saudi Arabia:

Saudi Arabia's trade balance touches \$30.12bn surplus in Q2
Saudi Arabia to export 100k tons of petrochemicals to India
Riyadh Cement's net profit surges 53% for H1

Egypt:

Banque du Caire's profits record EGP 2.6bn in H1 2023
CIB – Egypt reports 1Q 2022 consolidated net income of EGP 4.24bn
TFSE's authorized capital doubles to LE 400; Prime Minister

South Africa:

Santam ups dividend as profit soars 146%
Auto component companies to invest almost R5bn in SA
SA factory inflation rate drops to three-year low on lower fuel costs

India:

India to clock GDP growth of 6.5% in FY24; inflation no cause for concern: CEA
UPI transactions cross 10 billion mark in August
Adani group shares fall after OCCRP allegations on offshore owners

Vietnam:

Vietnam's coconut export to reach 1 billion USD in 2025
Central Highlands provinces promote trade connectivity with India
Over 416 million USD invested abroad in 8 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,810.21	0.7%	0.5%	0.2%	-3.9%	AED/USD	3.67	0.0%	0.0%
Egypt	18,873.82	0.3%	3.7%	7.3%	29.3%	EGP/USD	30.90	0.0%	25.1%
India	19,253.80	-0.5%	-0.1%	-2.5%	6.3%	INR/USD	82.66	0.0%	-0.1%
Kenya	1,540.16	0.5%	1.2%	-2.4%	-8.1%	KES/USD	145.50	0.1%	17.8%
Nigeria	2,447.85	0.03%	1.5%	4.4%	32.9%	NGN/USD	762.71	3.2%	39.5%
Saudi Arabia	11,491.20	-0.7%	0.8%	-1.7%	9.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,278.44	-0.3%	1.6%	-5.9%	3.5%	ZAR/USD	18.87	0.9%	10.8%
Vietnam	1,234.53	0.7%	3.4%	0.3%	22.8%	VND/USD	24,085.00	-0.2%	1.9%

MSCI Emerging Markets

MSCI Frontier	509.95	0.3%	1.7%	-1.1%	8.0%	Brent Crude (\$)	86.86	1.2%	1.1%
MSCI Frontier 100	1,175.01	0.4%	1.8%	-0.6%	7.7%	Gold (\$)	1,965.90	-0.4%	7.6%
MSCI Emerging	980.33	-0.8%	1.0%	-6.4%	2.5%	Copper (\$)	8,422.50	-0.6%	0.6%
MSCI World (USD)	2,986.02	-0.2%	2.5%	-2.6%	14.7%	Coffee (\$)	154.29	1.6%	-1.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Seplat Petroleum	1837.00	9.9%	67.0%	243.17	Nascon	50.55	-9.8%	355.4%	290.24
Stanbic IBTC	65.00	3.7%	94.3%	238.07	International Breweries	4.30	-6.5%	-8.5%	2.70
UACN	10.60	2.4%	3.4%	34.55	Dangote Sugar	55.00	-5.7%	242.7%	1600.51
United Capital PLC	14.80	1.7%	5.7%	66.07	Axamansard	3.65	-5.2%	82.5%	4.58
UBA	14.00	1.4%	84.2%	97.85	Unilever	13.35	-4.6%	15.1%	58.26
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	5.65	5.65	0.0%	31.53	Unilever	13.35	10.50	27.1%	58.26
Zenith	32.90	32.90	0.0%	294.45	Cap	20.95	15.25	37.4%	22.27
Wema	4.90	4.90	0.0%	6.17	UBN	6.50	4.65	39.8%	2.88
UBA	14.00	14.00	0.0%	97.85	Nestle	1100.00	764.90	43.8%	681.44
UACN	10.60	10.60	0.0%	34.55	International Breweries	4.30	2.70	59.3%	2.70

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
HILY HOLDING PJSC	3.24	9.8%	-0.3%	0.66	Al Ain Alahlia Insurance Co.	33.50	-9.5%	1.5%	0.35
Ras Al Khaimah Poultry & Feeding Co.	1.79	5.3%	11.2%	0.00	Abu Dhabi Aviation Co.	7.30	-4.0%	12.3%	8.64
Commercial Bank International	0.62	5.1%	-27.0%	0.00	Aram Group	1.71	-2.8%	-23.3%	0.01
Gulf Cement Co.	0.45	3.9%	-13.7%	0.02	Al Wathba National Insurance Co.	4.00	-2.4%	-10.3%	1.38
United Arab Bank	1.35	3.1%	58.8%	0.02	Waha Capital Company	1.68	-2.3%	23.5%	6.70
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
Oman & Emirates Investment Holding Co	0.41	0.41	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	0.0%	0.00
Umm Al Qaiwain General Investment Co. P.S.C	1.25	1.25	0.0%	0.00	Al Khazna Insurance Co.	0.24	0.00	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£)
Abou Kir Fertilizers	52.75	2.4%	36.0%	33.55	Orascom Construction PLC	115.60	-2.9%	20.5%	104.72
BPE Financial	17.77	2.1%	7.2%	35.18	Egyptian Tourism Resorts	3.90	-2.3%	99.0%	2.64
Commercial International Bank (Egypt)	57.00	2.0%	37.4%	2672.16	Belton Financial Hld	3.19	-2.2%	168.1%	15.12
QALA For Financial Investments	2.32	1.8%	11.5%	0.44	E-finance For Digital and Financial Investments	17.52	-2.1%	-7.8%	553.98
Oriental Weavers	15.89	1.4%	52.8%	16.84	Emaar Misr for Development SAE	3.05	-1.9%	-1.6%	6.13
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	25.12	25.79	-2.6%	21.17	Cleopatra Hospital Co.	3.84	3.81	0.8%	15.51
Telecom Egypt	26.30	28.99	-9.3%	9.35	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.12	1.62	30.9%	7.21
Orascom Construction PLC	115.60	129.00	-10.4%	104.72	E-finance For Digital and Financial Investments	17.52	13.22	32.5%	553.98
Misr Fertilizers Production Company - Mopco	238.97	270.00	-11.5%	3.52	Taaelem Management Services	3.72	2.72	36.8%	0.67
Oriental Weavers	15.89	18.43	-13.8%	16.84	T M G Holding	10.90	6.88	58.4%	64.31

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Maruti Suzuki India	10000.00	2.1%	19.1%	15801.286	Adani Enterprises Limited	2425.00	-3.5%	-37.1%	15185.03
HDFC Life Insurance Company Ltd	646.05	1.4%	14.1%	2871.03	Bharat Petroleum	340.30	-3.3%	3.0%	2331.55
Cipla	1253.40	1.4%	16.5%	3864.94	Adani Ports And Sez.	792.70	-3.2%	-3.1%	7958.44
LTIMINDTREE LIMITED	5235.00	1.2%	19.9%	3320.24	Britannia Inds.	4460.00	-2.0%	3.5%	3931.96
Titan Company	3112.00	1.0%	19.8%	4407.55	Eicher Motors	3341.00	-1.9%	3.5%	2804.39
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Maruti Suzuki India	10000.00	10065.00	-0.6%	15801.29	UPL	592.00	576.95	2.6%	4340.00
Mahindra & Mahindra	1577.70	1594.80	-1.1%	5546.60	HUL	2511.05	2393.00	4.9%	8117.72
Larsen & Toubro	2716.00	2766.80	-1.8%	6583.45	Kotak Mahindra Bank	1759.95	1643.50	7.1%	14674.98
Cipla	1253.40	1277.90	-1.9%	3864.94	Reliance Industries	2408.00	2180.00	10.5%	26077.00
Ultratech Cement	8311.90	8499.00	-2.2%	4003.02	Coal India	230.30	207.60	10.9%	2391.55

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	2.30	4.1%	-28.6%	0.06	Bamburi Cement Limited	24.90	-4.2%	-21.0%	0.02
Kenya Reinsurance Corporation Ltd	1.87	3.9%	2.2%	0.03	Equity Group Holdings Plc	38.85	-1.6%	-12.7%	63.52
Diamond Trust Bank Limited	48.70	2.1%	-2.6%	1.52	Kenya Power & Lighting Limited	1.54	-1.3%	-1.3%	0.50
Absa Bank Kenya	11.70	1.7%	-4.9%	1.29	Total Kenya Ltd	20.10	-1.2%	-15.7%	0.01
NCBA Group Plc	39.70	1.7%	0.9%	1.48	Safaricom Plc	15.40	-0.6%	-36.2%	23.06
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	39.70	41.70	-4.8%	1.48	KCB Group Plc	23.60	23.00	2.6%	22.79
Standard Chartered Bank Kenya Ltd	159.25	171.00	-6.9%	0.96	British American Tobacco Kenya Ltd	419.75	400.00	4.9%	5.37
Absa Bank Kenya	11.70	12.95	-9.7%	1.29	Bamburi Cement Limited	24.90	23.25	7.1%	0.02
Stanbic Holdings	114.00	129.75	-12.1%	0.03	WPP Scangroup Plc	2.76	2.57	7.4%	0.02
Nation Media Group	20.00	23.90	-16.3%	0.14	Nairobi Securities Exchange Plc	6.06	5.62	7.8%	0.02

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Wafrah for Industry and Development Co.	34.65	10.0%	35.4%	36.22	Almarai Co.	63.40	-4.7%	18.5%	75.79
Al Sagr Cooperative Insurance Co.	17.00	10.0%	21.1%	3.81	ACWA POWER Co.	193.00	-4.6%	27.0%	231.59
Etihad Atheeb Telecommunication Co.	113.80	8.4%	142.4%	305.58	Leejam Sports Co.	153.20	-4.1%	82.4%	28.66
Maharah Human Resources Co.	63.40	6.4%	23.1%	131.32	The Company for Cooperative Insurance	116.00	-4.1%	44.1%	619.34
National Company for Learning and Education	116.00	5.5%	69.8%	22.49	National Medical Care Co.	121.80	-3.5%	64.8%	16.40
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.	82.70	82.70	0.0%	34.16	Abdullah Al Othaim Markets Co.	14.56	14.56	0.0%	31.42
Jamjoom Pharmaceuticals Factory Co.	116.20	116.20	0.0%	18.86	Abdulmohsen Alhokair Group for Tourism and Development	2.31	2.31	0.0%	6.15
Al Mawarid Manpower Co.	131.00	131.00	0.0%	32.95	Al Kathiri Holding Co.	3.12	3.12	0.0%	9.47
Arabian Drilling Co.	185.60	185.60	0.0%	18.94	Al-Baha Investment and Development Co.	0.16	0.16	0.0%	4.54
Americana Restaurants International PLC	4.53	4.53	0.0%	59.84	Alkhabeer REIT Fund	6.59	6.59	0.0%	0.36

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Glencore PLC	10050.00	2.9%	-11.9%	83515.50	Northam Platinum Holdings Ltd	12450.00	-4.9%	-33.5%	39715.50
Anglo American PLC	50625.00	2.7%	-23.7%	60243.75	MTN Group Ltd	12032.00	-3.8%	-5.5%	150400.00
Sanlam Ltd	6815.00	2.5%	39.9%	87095.70	Impala Platinum Holdings Ltd	9746.00	-3.7%	-54.3%	87908.92
Prosus NV	130565.00	2.5%	10.9%	131870.65	Anglo American Platinum Ltd	67225.00	-3.4%	-52.8%	31003.50
BHP Group Ltd	54700.00	2.1%	3.8%	27871.84	Standard Bank Group Ltd	19321.00	-2.5%	15.1%	121722.30
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	108268.00	108403.00	-0.1%	15243.05	Mondi PLC	31491.00	31367.00	0.4%	17997.42
Remgro Ltd	15844.00	16000.00	-1.0%	42620.36	Growthpoint Properties Ltd	1181.00	1181.00	0.6%	20974.56
Reinet Investments SCA	40438.00	41165.00	-1.8%	30012.27	Nedbank Group Ltd	21581.00	21434.00	0.7%	94956.40
Bid Corp Ltd	42483.00	43600.00	-2.6%	69247.29	Anglo American PLC	50625.00	49513.00	1.2%	60243.75
Aspen Pharmacare Holdings Ltd	17126.00	17598.00	-2.7%	47610.28	Sasol Ltd	24426.00	24011.00	1.7%	47386.44

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Ho Chi Minh City Devp	16850.00	3.1%	5.6%	63.899,49	Vietnam National Petroleum Group	158000.00	-1.1%	398.4%	46.826,81
Masan Group Corp	81500.00	2.4%	-12.4%	205.956,35	Saigon Securities Inc	33400.00	-0.3%	88.7%	591.156,29
Vincom Retail	30300.00	2.0%	15.2%	218.887,32					
Viet Nam International Commercial Joint Stock Bank	20350.00	1.8%	7.1%	66.098,65					
PetroVietnam Power Corp	12450.00	1.6%	16.9%	234.033,77					
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	158000.00	158000.00	0.0%	46.826,81	BaoViet Holdings	45200.00	45200.00	0.0%	49.709,43
FPT Corp	96700.00	97944.43	-1.3%	135.881,72	No Va Land Invest	38550.00	38550.00	0.0%	28.125,48
Bank for Inv. and Devp	46950.00	49950.00	-6.0%	77.953,44	Phat Dat Real Estate Development Corp	12800.00	12800.00	0.0%	92.539,38
Vietcombank	89100.00	96000.00	-7.2%	136.656,36	Saigon Beer Alcohol Beverage Corp.	28100.00	28100.00	0.0%	41.229,58
Sai Gon Thuong Tin Commercial	32650.00	36700.00	-11.0%	608.609,68	Vietjet Aviation	98000.00	98000.00	0.0%	69.324,76

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