

Daily Market Report

5 September 2023

JSE

JSE All-Share Index increased by 0.79% and closed at 75,375.25 points on Monday, as the Resources and Financial sectors recorded gains.

BRVM

BRVM Composite Index declined by 0.52% and closed at 209.80 points on Monday, with Air Liquide Côte d'Ivoire and Oragroup Togo being the top losers.

NSE

NGX All-Share Index jumped by 1.11% to close at 68,279.14 on Monday, as the Banking, Insurance and Industrial sectors recorded gains.

EGX

EGX 30 Index increased by 0.99% and closed at 18,910.99 points on Monday, as the market gained LE 13 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased marginally by 0.01% to close at 888.51 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.79%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.52%
NGX Nigerian Stock Exchange	▲	1.11%
EGX Egyptian Stock Exchange	▲	0.99%
ESG Casablanca Stock Exchange	▲	0.01%

African Markets

Nigeria: NGX 30 Index jumped by 1.19% to close at 2,519.45 points on Monday. Dangote Sugar and Fidelity were the top gainers.

Egypt: EGX 30 Index increased by 0.99% and closed at 18,910.99 points on Monday, as the market gained LE 13 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.41% and closed at 1,544.95 points on Monday. WPP Scangroup Plc and Bamburi Cement Limited were the top gainers.

South Africa: JSE Top 40 Index increased by 0.86% and closed at 69,662.44 points on Monday, as the Resources and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 747.87
INTERBANK RATES	
OPR	1.58 ▼
Overnight	2.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.39% to close at 9,748.23 points on Monday, as losses in the Energy, Financials, and Industrials sectors pushed shares lower. MSCI UAE declined by 0.87% to close at 391.91 points.

Vietnam: VN-30 Index was closed on Monday on account of Independence Day.

Saudi Arabia: Tadawul All Share Index decreased by 0.22% to close at 11,430.87 points on Monday, as losses in the Health Care Equipment & Svc, Food & Staples Retailing, and Software & Services sectors pushed shares lower. MSCI Saudi Arabia declined by 0.46% and closed at 1,475.29 points.

India: Nifty 50 Index increased by 0.48% to close at 19,528.80 points on Monday, as gains in the IT, Metal, and PSU bank sectors led shares higher. MSCI India increased by 0.57% to close at 2,210.99 points.

News

Nigeria:

Stanbic IBTC's shareholders reap 124% capital gains
Fidelity Bank recorded N76.3bn profit in H1 – Report
Foreign investors repatriate \$5bn dividend – CBN

Kenya:

Britam Holdings HY 2023 Net Profit up 300% to KSh 1.6 billion
IFC invests Sh7bn in fund for Africa, Asia projects
Safaricom signs Sh15bn loan deal with lenders for growth

Abu Dhabi:

UAE gaming watchdog to boost Dubai real estate market, say experts
Alkhair Capital launches \$100m Islamic healthcare fund in Dubai
Real estate headhunter launches first retention-focused recruitment business Dubai

Saudi Arabia:

Saudi Arabia and Italy to sign 18 cooperation agreements across various sectors
Saudi Arabia's real estate exchange generates \$4.5bn in transactions
Saudi fintech sector flourishing with over 200 firms now driving innovation: SAMA chief

Egypt:

EGP 150m losses from electricity stations bombs: Electricity Minister
EGX, FRA join 'Financial & Digital Inclusion for Youth' summit
Egypt, Iraq discuss boosting urban development cooperation

South Africa:

Transnet dagger pointed at the heart of SA's economy
AVI and RCL Foods stomach increased food shedding costs
Renewable energy product demand boosts Bidvest profits

India:

Hero Moto to invest ₹550 crore in e-bike co Ather
India's power consumption grows by over 16% to 151.66 billion units in August
SpiceJet allots shares to lessors to cut ₹231 crores dues

Vietnam:

Vietnam-Indonesia trade expected to exceed 15 billion USD soon
Economic targets set in National Master Plan EVFTA Boots vietnam's Agricultural product exports to EU market

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,748.23	-0.4%	-0.4%	-0.6%	-4.5%	AED/USD	3.67	0.0%	0.0%
Egypt	18,910.99	1.0%	0.2%	0.2%	29.5%	EGP/USD	30.91	0.2%	25.1%
India	19,528.80	0.5%	0.5%	1.4%	7.9%	INR/USD	82.73	0.0%	0.0%
Kenya	1,544.95	0.4%	0.4%	0.3%	-7.8%	KES/USD	144.82	-0.6%	17.3%
Nigeria	2,519.45	1.2%	1.2%	2.9%	36.7%	NGN/USD	747.87	1.0%	38.3%
Saudi Arabia	11,430.87	-0.2%	-0.5%	-0.5%	9.1%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,662.44	0.9%	0.9%	0.6%	4.0%	ZAR/USD	19.13	1.5%	12.4%
Vietnam	1,234.53	0.0%	0.0%	0.0%	22.8%	VND/USD	24,085.00	0.0%	1.9%

MSCI Emerging Markets

MSCI Frontier	508.18	-0.1%	-0.1%	-0.3%	7.6%	Brent Crude (\$)	88.81	0.3%	3.4%
MSCI Frontier 100	1,174.73	-0.2%	-0.2%	-0.02%	7.7%	Gold (\$)	1,963.25	-0.2%	7.5%
MSCI Emerging	995.50	1.0%	1.0%	1.5%	4.1%	Copper (\$)	8,452.00	-0.6%	1.0%
MSCI World (USD)	2,990.17	0.02%	0.02%	0.1%	14.9%	Coffee (\$)	152.36	-0.6%	-2.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Sugar	66.55	10.0%	314.6%	1380.33	International Breweries	4.30	-6.5%	-8.5%	11.27
Nascon	61.15	10.0%	450.9%	919.21	Lafarge Africa	29.00	-2.5%	20.8%	93.55
P Z Cussons	19.10	9.1%	68.3%	50.49	Cap	20.50	-2.1%	15.2%	13.06
Fidelity	8.40	8.4%	93.1%	695.03	UACN	10.55	-0.5%	2.9%	37.09
Sterling	3.81	8.2%	172.1%	131.07					
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	6.00	6.00	0.0%	72.81	Unilever	13.50	10.50	28.6%	118.87
Zenith	34.40	34.40	0.0%	660.22	Cap	20.95	15.25	37.4%	0.82
Wema	5.28	5.28	0.0%	35.88	UBN	6.50	4.65	39.8%	2.44
UBA	14.90	14.90	0.0%	251.54	Nestle	1100.00	764.90	43.8%	7.25
UACN	10.60	10.60	0.0%	54.16	Nigerian Breweries	39.00	24.40	59.8%	39.38

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Hayah Insurance Company P.J.S.C	1.66	3.8%	71.1%	0.48	Union Insurance Co.	0.58	-9.9%	-8.9%	0.00
National Corporation for Tourism & Hotels	3.20	3.2%	6.7%	3.30	Abu Dhabi National Co. for Building Materials	0.35	-9.5%	92.3%	0.45
RAK Co. for White Cement & Construction Materials	1.33	3.1%	-25.7%	0.11	ADNOC Drilling Co.	3.95	-3.4%	32.6%	9.47
PALMS SPORTS PrJSC	10.88	2.6%	11.0%	2.44	The National Bank of Ras Al Khaimah	5.70	-3.4%	21.3%	0.06
Abu Dhabi National Insurance Company	6.10	2.5%	-1.6%	0.18	Emirates Telecom. Group Company	19.00	-3.1%	-16.9%	50.74
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	Emirates Telecom. Group Company	19.00	19.00	0.0%	50.74
Al Buhaira National Insurance Company	2.87	2.87	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Oman & Emirates Investment Holding Co	0.41	0.41	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Umm Al Qaiwain General Investment Co. P.S.C	1.25	1.25	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	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£)
T M G Holding	11.30	5.0%	13.1%	107.35	GB AUTO	6.07	-1.9%	13.2%	56.75
SODIC	19.95	4.6%	7.3%	5.66	BPE Financial	17.35	-1.8%	4.7%	9.41
Alexandria Containers&goods	28.00	4.3%	83.0%	7.15	Orascom Invest	0.24	-1.6%	-12.4%	7.00
Emaar Misr for Development SAE	3.17	4.3%	2.3%	36.96	Orascom Hotels	10.06	-1.4%	43.7%	16.30
Ezz Steel	51.60	4.1%	121.9%	47.47	Misr Fertilizers Production Company	232.50	-1.3%	63.3%	2.33
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	25.25	25.79	-2.1%	20.09	Cleopatra Hospital Co.	3.89	3.81	2.1%	5.80
Telecom Egypt	26.90	28.99	-7.2%	75.32	Tenth Of Ramadan Pharmaceutical Industries&Diagnostic	2.13	1.62	31.5%	11.75
Oriental Weavers	16.51	18.43	-10.4%	30.38	E-finance For Digital and Financial Investments	17.66	13.22	33.6%	1.32
Orascom Construction PLC	114.80	129.00	-11.0%	37.35	Taaleem Management Services	3.75	2.72	37.9%	0.26
Misr Fertilizers Production Company - Mopco	232.50	270.00	-13.9%	2.33	T M G Holding	11.30	6.88	64.2%	107.35

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Coal India	247.90	4.6%	10.2%	6094.621	Mahindra & Mahindra	1576.00	-1.0%	26.2%	3475.72
Wipro	434.45	4.4%	10.6%	5904.56	Nestle India Limited	21700.20	-1.0%	10.7%	1610.04
Hcl Technologies	1232.00	3.9%	18.5%	5499.41	ITC	437.50	-0.8%	32.0%	5964.94
Hindalco Industries	487.85	3.1%	3.1%	5055.61	Axis Bank	983.45	-0.8%	5.3%	6623.66
NTPC	236.25	2.4%	41.9%	5122.25	Bajaj Finance	7278.30	-0.6%	10.7%	4249.76
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
NTPC	236.25	236.50	-0.1%	5122.25	HUL	2501.90	2393.00	4.6%	2857.37
Hcl Technologies	1232.00	1235.00	-0.2%	5499.41	UPL	608.50	576.95	5.5%	2549.92
Wipro	434.45	436.50	-0.5%	5904.56	Kotak Mahindra Bank	1764.60	1643.50	7.4%	8299.87
Grasim Industries	1843.85	1855.00	-0.6%	1735.15	Reliance Industries	2411.05	2180.00	10.6%	11280.48
Tata Steel	131.90	132.90	-0.8%	9024.18	State Bank Of India	575.60	499.35	15.3%	6936.69

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	2.82	8.0%	-6.3%	0.12	Diamond Trust Bank Limited	47.00	-3.0%	-6.0%	0.76
Bamburi Cement Limited	25.95	5.5%	-17.6%	6.02	Centum Investment Company Plc	8.80	-1.8%	5.3%	8.69
Total Kenya Ltd	18.90	2.2%	-20.8%	0.06	East African Breweries Limited	134.25	-0.9%	-19.9%	1.24
Nairobi Securities Exchange Plc	5.96	1.7%	-12.1%	0.12	Equity Group Holdings Plc	38.10	-0.9%	-14.4%	22.86
The Cooperative Bank of Kenya Ltd	12.00	1.3%	-2.4%	0.67	Kengen Limited	2.32	-0.9%	-28.0%	0.21
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	40.00	41.70	-4.1%	7.38	KCB Group Plc	23.45	23.00	2.0%	5.44
Standard Chartered Bank Kenya Ltd	159.75	171.00	-6.6%	5.08	Total Kenya Ltd	18.90	18.25	3.6%	0.06
Absa Bank Kenya	11.75	12.95	-9.3%	8.28	British American Tobacco Kenya Ltd	418.00	400.00	4.5%	35.45
Stanbic Holdings	111.50	129.75	-14.1%	10.72	Nairobi Securities Exchange Plc	5.96	5.62	6.0%	0.12
The Cooperative Bank of Kenya Ltd	12.00	14.00	-14.3%	0.67	Equity Group Holdings Plc	38.10	35.80	35.80	22.86

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
The Company for Cooperative Insurance	126.40	9.9%	57.0%	205.79	Al-Baha Investment and Development Co.	0.15	-6.3%	-98.7%	3.59
Ethiad Atheeb Telecommunication Co.	126.60	9.9%	169.6%	323.79	National Company for Learning and Education	108.40	-3.9%	58.7%	16.95
ACWA POWER Co.	201.80	6.8%	32.8%	116.58	Elm Co.	813.00	-3.6%	144.9%	137.52
Al Mawarid Manpower Co.	138.60	5.3%	1215.0%	136.70	Al Gassim Investment Holding Co.	20.36	-3.5%	8.3%	10.77
Al-Rajhi Company for Cooperative Insurance	168.20	3.7%	87.9%	59.93	Raydan Food Co.	26.45	-3.5%	26.7%	3.53
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.	83.60	83.60	0.0%	40.78	Abdullah Al Othaim Markets Co.	14.42	14.42	0.0%	10.68
Jamjoom Pharmaceuticals Factory Co.	116.40	116.40	0.0%	48.43	Abdulmohsen Alhokair Group for Tourism and Development	2.24	2.24	0.0%	3.87
Al Mawarid Manpower Co.	138.60	138.60	0.0%	136.70	Al Kathiri Holding Co.	3.04	3.04	0.0%	10.73
Arabian Drilling Co.	180.00	180.00	0.0%	27.19	Al-Baha Investment and Development Co.	0.15	0.15	0.0%	3.59
Americana Restaurants International PLC	4.42	4.42	0.0%	27.53	Alkhabeer REIT Fund	6.64	6.64	0.0%	1.88

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	44088.00	3.1%	33.7%	28162.53	Impala Platinum Holdings Ltd	8838.00	-4.9%	-58.5%	38798.82
BHP Group Ltd	56291.41	2.9%	6.9%	34782.46	Northam Platinum Holdings Ltd	11470.00	-3.8%	-38.7%	31657.20
Capitec Bank Holdings Ltd	160000.00	2.7%	-13.9%	46721.60	Sibanye Stillwater Ltd	2719.00	-1.8%	-39.2%	23709.68
Glencore PLC	10446.00	2.6%	-8.4%	34471.80	Anglo American Platinum Ltd	62000.00	-1.7%	-56.5%	19256.58
Cie Financiere Richemont SA	269741.00	2.2%	20.9%	26342.91	Aspen Pharmicare Holdings Ltd	16608.00	-1.6%	21.8%	14474.70
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)
Bid Corp Ltd	44088.00	44229.00	-0.3%	28162.53	Growthpoint Properties Ltd	1181.00	1181.00	0.0%	7192.29
Remgro Ltd	15842.00	15949.00	-0.7%	8068.33	Nedbank Group Ltd	21569.00	21456.00	0.5%	20341.29
Anheuser-Busch InBev SA/NV	106173.00	108000.00	-1.7%	20363.98	Mondi PLC	31517.00	31256.00	0.8%	7691.72
Aspen Pharmicare Holdings Ltd	16608.00	17020.00	-2.4%	14474.70	Anglo American PLC	51628.00	51066.00	1.1%	37560.92
Reinet Investments SCA	41076.00	42119.00	-2.5%	4395.54	Sasol Ltd	24731.00	24380.00	1.4%	25967.55

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

*Market closed on 4/9

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