

Daily Market Report

13 June 2024

JSE

JSE All-Share Index increased by 1.28% and closed at 77,050.80 points on Wednesday, as Industrial, Resource and Financial sectors recorded gains.

BRVM

BRVM Composite decreased by 0.04% to close at 225.85 points on Wednesday, with Sogb Côte d'Ivoire and Setao Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index closed on Wednesday on account of Democracy Day.

EGX

The EGX 30 Index increased by 0.20% and closed at 26,133.39 points on Wednesday, as market gained LE 7 billion of market cap amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index decreased by 0.20% to close at 955.27 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.28%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.04%
NGX Nigerian Stock Exchange	↔ 0.00%
EGX Egyptian Stock Exchange	▲ 0.20%
ESG Casablanca Stock Exchange	▼ 0.20%

African Markets

Nigeria: NGX 30 Index was closed on Wednesday on account of Democracy Day.

Egypt: The EGX 30 Index increased by 0.20% and closed at 26,133.39 points on Wednesday, as market gained LE 7 billion of market cap amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.50% and closed at 1,756.12 points on Wednesday. Centum Investment Company Plc and Kenya Reinsurance Corporation Ltd were the top gainers.

South Africa: JSE Top 40 increased by 1.32% and closed at 70,706.56 points on Wednesday, as the Industrial, Resource and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	33.69%
Exchange Rate (I&E window)	₦1,473.66
INTERBANK RATES	
OPR	30.03 ▼
Overnight	30.63 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.14% to close at 8,978.20 points on Wednesday, as losses in the HealthCare, Utilities and Telecommunication sectors dragged shares lower. MSCI UAE decreased by 0.43% to close at 357.11 points.

Vietnam: VN-30 Index increased by 1.80% to close at 1,331.80 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 1.19% to close at 449.38 points.

Saudi Arabia: Tadawul All Share Index decreased by 1.05% to close at 11,651.81 points on Wednesday, as losses in the Utilities, Commercial & Professional Service and Pharma Biotech & LifeScience sectors dragged shares lower. MSCI Saudi Arabia decreased by 1.12% to close at 1,456.40 points.

India: Nifty 50 index increased by 0.25% to close at 23,322.95 points on Wednesday, as the Media, HealthCare and Oil & Gas sectors pushed shares higher. MSCI India increased by 0.45% to close at 2,523.13.

News

Nigeria:

NEMA Partners NSCDC to Mitigate the Impact of Flooding in 2024
Gas: NNPC signs floating LNG deal with Golar to deliver 500mmscf
Nigerian govt bids to host \$5 billion Africa energy bank

Kenya:

Posta's revival strategy bags Sh3bn from the budget team
Stalled BRT project gets Sh3bn for pending bills
State Writes-Off KSh 6.8Bn Debt in Coffee Reforms Agenda

Abu Dhabi:

UAE EGA's acquisition of Leichtmetall fully funded by green loan
Dubai to reaffirm its position as global capital of digital economy
Abou Eid delivers Dhs70 million project in Dubai ahead of schedule

Saudi Arabia:

Saudi Fisheries secures \$5mln banking facility from Riyadh Bank
Saudi Arabia keen to invest in multiple sectors in Brazil
Saudi Arabia leads global desalinated water production surge

Egypt:

Trade exchange between Egypt, Arab states hit \$26B in 2023
MSMEDA, EABA sign MoU to offer new marketing opportunities for Egyptian SMEs
UAE's AD Ports Group to invest \$4.7m in Egyptian cruise terminals

South Africa:

Transnet meets with the World Bank to rectify 'factual errors' in the port index
Takealot adopts wait and see approach to Amazon's traction in SA
SA's economic imbalance poses challenges for gender parity

India:

Samsung partners with Paytm to bring travel entertainment ticket bookings with a rider
Chinese-Indian JVs may get Govt nod, but Govt steps help boost toy exports and manufacturing; more work needed

Vietnam:

ADB supports financial access for women-owned businesses in Viet Nam
Vietnam's instant noodles no longer subject to EU's food safety control
Vietnam wants to develop relations with Indonesia to new height: NA Chairman

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,978.20	-0.1%	0.3%	1.3%	-6.3%	AED/USD	3.67	0.0%	0.0%
Egypt	26,133.39	0.2%	0.2%	-2.7%	5.2%	EGP/USD	47.69	0.3%	53.9%
India	23,322.95	0.2%	0.1%	3.5%	7.3%	INR/USD	83.53	-0.1%	0.3%
Kenya	1,756.12	0.5%	-0.4%	2.0%	17.0%	KES/USD	128.50	-0.4%	-18.2%
Nigeria	3,688.19	0.0%	0.5%	0.3%	32.2%	NGN/USD	1,473.66	0.0%	62.5%
Saudi Arabia	11,651.81	-1.1%	-1.1%	0.2%	-2.6%	SAR/USD	3.75	0.0%	0.03%
South Africa	70,706.56	1.3%	0.2%	0.4%	0.3%	ZAR/USD	18.38	-0.9%	0.5%
Vietnam	1,331.81	1.8%	1.8%	4.4%	17.7%	VND/USD	25,442.50	0.0%	4.9%

MSCI Emerging Markets

MSCI Frontier	530.61	1.1%	0.02%	0.8%	4.7%	Brent Crude (\$)	82.60	0.8%	7.2%
MSCI Frontier 100	1,140.32	1.2%	-0.2%	0.4%	-1.6%	Gold (\$)	2,354.80	1.2%	13.7%
MSCI Emerging	1,068.55	0.3%	-0.4%	1.9%	4.4%	Copper (\$)	9,944.50	1.9%	16.2%
MSCI World (USD)	3,516.30	1.0%	1.1%	2.1%	11.0%	Coffee (\$)	221.71	-0.6%	25.3%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Geregu Power	1000.00	9.6%	150.6%	1.95	Nigerian Breweries	29.00	-9.9%	-19.4%	2905.37
United Capital PLC	20.00	5.5%	-13.0%	75.40	Total	388.90	-2.9%	1.0%	180.09
Wema	6.80	4.4%	21.4%	13.50	Zenith	35.00	-0.7%	-9.4%	2565.33
Flour Mills	41.80	0.7%	26.5%	31.68	FCMB	7.85	-0.4%	6.1%	85.60
					Okomu Oil	255.70	-0.3%	-1.7%	35.12
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Geregu Power	1000.00	1000.00	0.0%	1.95	Nestle	910.00	764.90	19.0%	114.04
BUA Foods	379.90	379.90	0.0%	8.25	International Breweries	4.00	2.70	48.1%	2.04
FCMB	7.85	7.85	0.0%	85.60	Unilever	15.85	10.50	51.0%	4.42
Zenith	35.00	35.00	0.0%	2565.33	Stanbic IBTC	52.70	24.50	115.1%	14.47
Wema	6.80	6.80	0.0%	13.50	Guaranty	41.05	18.00	128.1%	1370.60

*Market closed on 12/5

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement Co.	0.44	3.6%	-5.4%	0.03	AL KHALEEJ Investment	1.62	-10.0%	-21.7%	0.06
The National Bank of Ras Al Khaimah	5.30	2.9%	0.0%	2.12	Hayah Insurance Company	1.03	-8.0%	4.0%	0.15
Abu Dhabi Commercial Bank	7.89	2.6%	-14.1%	67.25	Multiply Group	1.97	-3.9%	-38.1%	60.60
Abu Dhabi Ports Company PJSC	5.20	2.4%	-18.5%	8.21	Manazel PJSC	0.36	-3.8%	1.7%	5.88
ADNOC Logistics & Services plc	4.27	1.7%	11.5%	34.79	ESG Emirates Stallions Group	9.62	-3.7%	8.1%	8.50
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 Wathba National Insurance Co.	5.75	5.75	0.0%	0.00	Al Seer Marine Supplies & Equipment Co.	4.12	4.12	0.0%	2.47
Al Dhafra Insurance Co.	5.80	5.80	0.0%	0.00	ANAN Investment Holding	4.07	4.07	0.0%	0.00
Al Buhaira National Ins. Co.	3.00	3.00	0.0%	0.00	Sawaeed Holding	6.78	6.78	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	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£)
Delta Sugar	60.00	3.5%	-16.9%	9.05	Eastern Company	18.00	-3.7%	-36.6%	20.94
Orascom Construction PLC	269.89	3.4%	49.8%	46.82	Palm Hills Development Co.	4.04	-1.9%	51.9%	116.02
Belton Financial Holding	2.85	3.3%	-14.7%	92.46	EFG Holding	17.10	-1.4%	4.8%	98.94
Orascom Development Egypt	10.49	2.5%	-5.5%	10.50	Ezz Steel	74.89	-1.4%	-18.6%	21.96
Oriental Weavers	21.52	2.5%	27.3%	24.01	Juhayna Food Industries	17.43	-1.3%	11.2%	2.65
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£)
Misr Fertilizers Production Company	41.50	41.50	0.0%	41.52	Egyptian Kuwaiti Holding	29.44	29.44	0.0%	5.91
Commercial International Bank	74.00	74.00	0.0%	143.80	QALA For Financial Investments	1.81	1.75	3.4%	62.09
ELSWEDY Electric	47.02	49.00	-4.0%	88.12	Belton Financial Holding	2.85	2.38	19.7%	92.46
Oriental Weavers	21.52	26.96	-20.2%	24.01	Heliopolis Housing	9.70	7.95	22.0%	33.55
GB Corp	11.35	14.24	-20.3%	0.95	EFG Holding	17.10	13.90	23.0%	98.94

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Coal India	489.60	2.8%	30.2%	754.04	Mahindra & Mahindra	2796.65	-1.4%	61.7%	725.89
Power Grid Corp Of India	324.25	2.4%	36.7%	658.06	Britannia Inds.	5448.00	-1.3%	2.1%	152.69
Eicher Motors	4845.00	1.8%	16.9%	251.87	HUL	2531.50	-1.0%	-5.0%	444.31
SBI Life Insurance	1452.95	1.7%	1.4%	263.99	Tata Consumer Products Ltd.	1125.25	-0.9%	3.5%	87.34
Tech Mahindra	1371.75	1.7%	7.79%	381.48	Titan Company	3384.95	-0.8%	-7.9%	695.27
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	9900.00	9944.00	-0.4%	273.95	ITC	432.60	399.35	8.3%	447.59
Cipla	1538.30	1549.00	-0.7%	243.51	Asian Paints	2904.15	2670.10	8.8%	492.06
Tata Steel	182.47	183.87	-0.8%	609.31	LTIMINDTREE Ltd	4950.00	4513.55	9.7%	351.12
Bharti Airtel	1436.00	1447.85	-0.8%	703.15	Kotak Mahindra Bank	1716.50	1543.85	11.2%	1011.06
Hero Motocorp	5786.00	5859.00	-1.2%	388.37	Bajaj Finserv	1580.00	1419.05	11.3%	283.29

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	8.94	4.7%	6.4%	0.22	NCBA Group Plc	40.60	-2.1%	4.2%	0.40
Kenya Reinsurance Corporation Ltd	2.80	4.5%	48.9%	2.59	KCB Group Plc	35.45	-1.4%	61.9%	2.41
CIC Insurance Group Ltd	2.24	2.8%	-0.9%	0.63	Total Kenya Ltd	23.25	-0.9%	29.2%	0.10
Standard Chartered Bank Kenya Ltd	193.50	0.9%	19.4%	0.83	Nation Media Group	20.00	-0.5%	-0.2%	17.36
Kengen Limited	2.41	0.8%	19.9%	4.94					
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)
Absa Bank Kenya	13.85	14.30	-3.1%	5.17	Centum Investment Company Plc	8.94	7.60	17.6%	0.22
Kenya Power & Lighting Limited	1.79	1.85	-3.2%	1.92	Kengen Limited	2.41	1.94	24.2%	4.94
Standard Chartered Bank Kenya Ltd	193.50	200.00	-3.3%	0.832	Stanbic Holdings	115.00	90.00	27.8%	0.07
BK Group Plc	35.55	37.00	-3.9%	0.03	Equity Group Holdings Plc	43.75	33.70	29.8%	1.72
NCBA Group Plc	40.60	45.00	-9.8%	0.40	I&M Group Plc	20.70	15.80	31.0%	0.82

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Miahona Co.	22.74	10.0%	52.2%	160.31	Al-Baha Inv. and Development Co.	0.13	-7.1%	-7.1%	1.07
Retal Urban Development Co.	10.40	7.1%	21.8%	74.56	Maharah Human Resources Co.	6.07	-6.0%	-92.4%	117.02
SABIC Agri-Nutrients Co	113.20	3.3%	-18.1%	150.81	Electrical Industries Co.	5.75	-4.6%	102.5%	46.78
SAL Saudi Logistics Services Co.	291.00	2.6%	49.7%	244.22	National Agricultural Marketing Co.	47.85	-4.5%	277.4%	16.71
Saudi Cable Co.	67.10	2.4%	6.7%	17.24	ACWA POWER Co.	350.40	-4.3%	36.3%	210.22
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)
MBC Group Co.	44.30	44.30	0.0%	30.70	Abdullah Al Othaim Markets Co.	11.58	11.58	0.0%	11.69
LIVA Insurance Co.	17.70	17.70	0.0%	1.65	Abdulmohsen Alhokair Group for Tourism and Dev.	2.65	2.65	0.0%	3.03
SAL Saudi Logistics Services Co.	291.00	291.00	0.0%	244.22	Advanced Petrochemical Co.	38.35	38.35	0.0%	16.21
Lumi Rental Co.	89.70	89.70	0.0%	16.96	Al Kathiri Holding Co.	2.65	2.65	0.0%	4.36
Jamjoom Pharmaceuticals Factory Co.	140.60	140.60	0.0%	14.21	AlAhli REIT Fund 1	7.78	7.78	0.0%	1.83

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
FirstRand Ltd	6632.00	2.9%	52.2%	30971.44	Mr Price Group Ltd	18062.00	-1.3%	-22.7%	6737.13
Northam Platinum Holdings Ltd	11021.00	2.3%	-19.9%	3714.08	Bidvest Group Ltd/The	24321.00	-1.1%	25.3%	2115.93
MTN Group Ltd	8145.00	2.1%	-3.9%	17837.55	AngloGold Ashanti Ltd	41660.00	-1.0%	0.8%	9956.74
Discovery Ltd	11730.00	1.8%	44.1%	5043.90	Reinet Investments SCA	47740.00	-0.9%	7.2%	716.10
Impala Platinum Holdings Ltd	8570.00	1.6%	22.9%	6110.41	Woolworths Holdings Ltd	5378.00	-0.9%	24.2%	2097.42
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)
Prosus NV	68314.00	68314.00	0.0%	10110.47	Anglo American Platinum Ltd	57121.00	57121.00	0.0%	2856.05
Naspers Ltd	381808.00	381808.00	0.0%	31308.26	Discovery Ltd	11730.00	11730.00	0.0%	5043.90
Mr Price Group Ltd	18062.00	18062.00	0.0%	6737.13	MTN Group Ltd	8145.00	8145.00	0.0%	17837.55
Capitec Bank Holdings Ltd	222565.00	222565.00	0.0%	14244.16	Sasol Ltd	12089.00	12089.00	0.0%	6854.46
Aspen Pharmacare Holdings Ltd	23119.00	23119.00	0.0%	1849.52	Woolworths Holdings Ltd	5378.00	5378.00	0.0%	2097.42

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Prosperity	19400.00	6.0%	1.0%	1308973.68	FPT Corp	132000.00	-9.9%	37.4%	1464082.57
Masan Group Corp	77800.00	2.6%	16.1%	450708.70	PetroVietnam Power Corp	14000.00	-1.1%	24.4%	196926.14
Military Commercial Bank	23100.00	2.4%	23.9%	574375.62	Saigon Beer Alcohol Beverage Corp.	67000.00	-0.9%	6.3%	114114.99
Saigon Securities Inc	36600.00	2.2%	11.6%	993061.37					
Investment & Industrial Development JS Corp.	64200.00	2.1%	2.1%	41944.29					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
FPT Corp	132000.00	132000.00	0.0%	1464082.57	BaoViet Holdings	46200.00	46200.00	0.0%	25577.09
Bank for Inv. and Devp	47900.00	49950.00	-4.1%	125268.85	Petrovietnam Gas	80400.00	80400.00	0.0%	107497.10
Vietcombank	88700.00	96000.00	-7.6%	197905.35	Saigon Beer Alcohol Beverage Corp.	67000.00	67000.00	0.0%	114114.99
Ho Chi Minh City Devp	24000.00	27160.00	-11.6%	152444.13	Southeast Asia Commercial JS Bank	21600.00	21600.00	0.0%	35718.77
Techcombank	49400.00	56000.00	-11.8%	450731.38	Vinhomes	38500.00	38500.00	0.0%	469988.78

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