

Daily Market Report

19 June 2024

JSE

JSE All-Share Index increased by 3.50% and closed at 79,748.83 points on Tuesday, as the Industrial, Resource and Financial sectors recorded gains.

BRVM

BRVM Composite decreased by 0.23% to close at 228.35 points on Tuesday, with Uniwax Côte d'Ivoire and Bollre Transport & Logistics being the top losers

NSE

NGX All-Share Index was closed on Tuesday, on account of Eid-el Kabir.

EGX

The EGX 30 Index was closed on Tuesday on account of Eid-al Adha.

ESG

Casablanca ESG 10 Index was closed on Tuesday on account of Eid-al Adha.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 3.50%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.23%
NGX Nigerian Stock Exchange	↔ 0.00%
EGX Egyptian Stock Exchange	↔ 0.00%
ESG Casablanca Stock Exchange	↔ 0.00%

African Markets

Nigeria: NGX 30 Index was closed Tuesday on account of Eid-el Kabir.

Egypt: The EGX 30 Index was closed on Tuesday on account of Eid-al Adha

Kenya: NSE 20 Index decreased by 0.68% and closed at 1,732.42 points on Tuesday. Kenya Power & Lighting Limited and BK Group Plc were the top losers.

South Africa: JSE Top 40 increased by 3.32% and closed at 72,863.74 points on Tuesday, as the Industrial, Resource and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	33.95%
Exchange Rate (I&E window)	₦1,482.72
INTERBANK RATES	
OPR	25.63 ▼
Overnight	26.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index was closed on Tuesday on account of Eid-al Adha.

Vietnam: VN-30 Index decreased by 0.50% to close at 1,309.89 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.11% to close at 441.64 points.

Saudi Arabia: Tadawul All Share Index was closed on Tuesday on account of Eid-al Adha.

India: Nifty 50 index increased by 0.39% to close at 23,557.90 points on Tuesday, as the Real Estate, Consumer Durables and Information Technology sectors pushed shares higher. MSCI India increased by 0.63% to close at 2,564.30.

News

Nigeria:

Western multinationals fleeing Nigeria are being replaced by Asian and Turkish firms. Nigeria's trade surplus with ECOWAS rises 216% to N1.14trn
More naira, less value as inflation erodes N7.6tn consumer spending

Kenya:

Safaricom and Pezesa Introduce 'Mkopo Wa Pochi' to Lend Small Businesses
Taxes on sale of beer, fuel, cosmetics post a rare fall
KNH payment system under audit amid fears millions have been lost

Abu Dhabi:

ADDED and Dubai's Broaden Energy to set up \$272m hydrogen equipment complex
UAE's GDP set to get a boost from collaborations with Nasdaq giants
UAE: Brookfield-led consortium to invest in GEMS Education

Saudi Arabia:

Saudi Arabia climbs to 16th place in World Competitiveness Index
Saudi crown prince, Canadian prime minister discuss relations during call
Saudi pavilion at defense exhibition in Paris showcases achievements

Egypt:

Egypt exports 1.1 million tons of citrus fruits worth \$576 million in 6 months
UN to continue backing Egypt's sustainable development efforts
Egypt, Qatar working to bridge views with Hamas regarding ceasefire, Blinken

South Africa:

International tech company goes local, starts production in SA
Sanlam to acquire 60% of MultiChoice's insurance business for R1.2bn
Eskom to ramp up transmission development

India:

Bharti Airtel acquires 1% stake in Indus Towers as Vodafone group offloads equity
Tata Motors to revive Jaguar Land Rover's Freelander as a Made-in-China EV
Embraer sees India, Saudi Arabia, EU, US as strategic defense markets

Vietnam:

Foreign developers dominate the modern warehouse market in Viet Nam
extensive relations: ambassador President Putin's state visit to strengthen Vietnam - Russia ties

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,932.94	0.0%	0.0%	0.8%	-6.7%	AED/USD	3.67	0.0%	0.01%
Egypt	26,417.60	0.0%	0.0%	-1.7%	6.4%	EGP/USD	47.71	0.01%	54.0%
India	23,557.90	0.4%	0.4%	4.6%	8.4%	INR/USD	83.37	-0.2%	0.1%
Kenya	1,732.42	-0.7%	-0.7%	0.6%	15.4%	KES/USD	129.00	0.4%	-17.8%
Nigeria	3,700.52	0.0%	0.0%	0.7%	32.6%	NGN/USD	1,482.72	0.0%	63.5%
Saudi Arabia	11,498.93	0.0%	0.0%	-1.1%	-3.9%	SAR/USD	3.75	0.0%	0.05%
South Africa	72,863.74	3.3%	3.3%	3.4%	3.4%	ZAR/USD	18.04	-1.1%	-1.4%
Vietnam	1,309.89	-0.5%	-0.5%	2.7%	15.8%	VND/USD	25,452.50	0.01%	5.0%

MSCI Emerging Markets

MSCI Frontier	528.22	0.7%	0.7%	0.3%	4.2%	Brent Crude (\$)	85.33	1.3%	10.8%
MSCI Frontier 100	1,135.22	0.5%	0.5%	-0.1%	-2.1%	Gold (\$)	2,346.90	0.8%	13.3%
MSCI Emerging	1,081.81	0.5%	0.5%	3.1%	5.7%	Copper (\$)	9,671.50	0.1%	13.0%
MSCI World (USD)	3,522.68	0.9%	0.9%	2.2%	11.2%	Coffee (\$)	226.32	1.1%	27.9%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Geregu Power	1000.00	5.4%	150.6%	17.91	Access	18.65	-9.9%	-19.4%	362.39
Total	388.90	4.6%	1.0%	25.37	P Z Cussons	22.00	-5.6%	-17.6%	0.94
Guinness	60.25	3.1%	-8.7%	20.45	Julius Berger	89.50	-3.5%	108.1%	23.37
UBA	22.35	2.8%	-12.9%	355.31	United Capital PLC	21.00	-3.2%	-8.7%	44.99
Custodian	9.35	0.5%	3.9%	6.76	Fidelity	10.00	-1.9%	-7.8%	249.82
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%	17.91	Nigerian Breweries	31.65	24.40	29.7%	57.71
BUA Foods	379.90	379.90	0.0%	0.76	Unilever	15.05	10.50	43.3%	3.11
FCMB	7.75	7.75	0.0%	12.04	International Breweries	3.95	2.70	46.3%	6.38
Zenith	36.00	36.00	0.0%	1008.79	Custodian	9.35	4.55	105.5%	6.76
Wema	7.10	7.10	0.0%	21.48	Stanbic IBTC	52.00	24.50	112.2%	190.57

*Market closed on 18/6

Abu Dhabi*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Alpha Dhabi Holding PJSC	12.22	5.3%	-35.0%	97.28	RAK Properties	1.08	-3.6%	-7.7%	6.14
National Corporation for Tourism & Hotels	2.41	4.8%	2.1%	1.53	Union Insurance Company	0.62	-3.1%	-4.6%	0.04
Abu Dhabi National Co. for Building Materials	0.31	3.3%	28.1%	0.39	RAK Co. for White Cement & Construction Mtls	1.07	-1.8%	-6.1%	0.01
Invictus Investment Company PLC	2.22	3.3%	-14.3%	1.83	International Holding Company	407.50	-1.6%	2.0%	180.99
Pure Health Holding PJSC	4.30	2.6%	-24.6%	51.97	ADNOC Logistics & Services plc	4.14	-1.4%	8.1%	6.86
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	Sawaheed Holding P.J.S.C	6.78	6.78	0.0%	0.00
Al Dhafra Insurance Co.	5.80	5.80	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Buhaira National Insurance Company	3.00	3.00	0.0%	0.00	Methaq Takaful Insurance Co.	0.65	0.65	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Invest Bank	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Gulf Investment House Company	4.50	4.50	0.0%	0.00

*Market closed on 18/6

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 - Mopco	41.50	41.50	0.0%	41.52	Egyptian Kuwaiti Holding-EGP	29.44	29.44	0.0%	5.91
Commercial International Bank (Egypt)	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

*Market closed on 18/6

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Shriram Finance Limited	2820.00	3.2%	37.3%	691.99	Maruti Suzuki India	12570.00	-2.1%	22.0%	1039.21
Power Grid Corp Of India	331.55	3.1%	39.8%	713.29	Dr Reddys Lab	5988.00	-1.6%	3.3%	369.52
Wipro	491.55	2.9%	4.3%	781.19	Ultratech Cement	11120.10	-1.1%	5.9%	359.01
ICICI Bank	1125.75	1.8%	13.0%	2044.49	Tata Steel	181.25	-1.0%	29.8%	637.97
Titan Company	3586.00	1.6%	-2.43%	569.86	Hindalco Industries	678.00	-0.8%	10.3%	273.94
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Cipla	1575.00	1576.95	-0.1%	325.04	ITC	429.00	399.35	7.4%	607.17
Shriram Finance Limited	2820.00	2841.15	-0.7%	691.99	Asian Paints	2920.00	2670.10	9.4%	216.14
Eicher Motors	4930.00	4976.00	-0.9%	349.66	Kotak Mahindra Bank	1721.40	1543.85	11.5%	978.22
Bajaj Auto	9920.00	10038.80	-1.2%	205.16	Bajaj Finserv	1597.35	1419.05	12.6%	204.50
Divi's Laboratories Limited	4570.00	4627.95	-1.3%	109.80	LTIMINDTREE Ltd	5089.00	4513.55	12.7%	355.55

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	23.50	1.3%	30.6%	1.07	Kenya Power & Lighting Limited	1.73	-71.2%	21.8%	0.17
Kengen Limited	2.41	1.3%	19.9%	3.05	BK Group Plc	34.20	-5.0%	-4.5%	0.09
East African Breweries Limited	143.50	0.9%	25.9%	5.09	The Cooperative Bank of Kenya Ltd	13.05	-2.6%	14.5%	1.91
Safaricom Plc	18.30	0.5%	31.7%	22.88	KCB Group Plc	34.55	-2.5%	57.8%	6.10
CIC Insurance Group Ltd	2.19	0.5%	-3.1%	0.14	British American Tobacco Kenya Ltd	355.25	-1.3%	-12.8%	40.75
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)
Standard Chartered Bank Kenya Ltd	196.75	200.00	-1.6%	26.38	Centum Investment Company Plc	8.54	7.60	12.4%	0.27
Absa Bank Kenya	13.95	14.30	-2.4%	17.28	Kengen Limited	2.41	1.94	24.2%	3.05
Kenya Power & Lighting Limited	1.73	1.85	-6.5%	0.17	Nation Media Group	17.95	14.00	28.2%	0.25
BK Group Plc	34.20	37.00	-7.6%	0.09	Stanbic Holdings	116.00	90.00	28.9%	10.12
Total Kenya Ltd	23.50	26.00	-9.6%	1.07	BK Group Plc	34.20	26.50	29.1%	0.09

Saudi Arabia*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Rasan Information Technology Co.	48.10	30.0%	0.0%	62.61	Saudi Manpower Solutions Co.	8.28	-8.5%	-8.5%	484.63
Al Taiseer Group Talco Industrial Co.	49.20	14.4%	0.0%	1039.84	ACWA POWER Co.	331.80	-5.3%	29.1%	277.02
Al Moammar Information Systems Co.	163.00	7.2%	19.9%	89.02	Miahona Co.	21.56	-5.2%	44.3%	493.29
Saudi Cable Co.	70.80	5.5%	12.6%	32.27	Sahara International Petrochemical Co.	29.20	-3.6%	-14.2%	116.26
CHUBB Arabia Cooperative Insurance Co.	32.00	4.9%	28.0%	4.25	Savola Group	42.80	-3.3%	14.3%	41.37
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)
Rasan Information Technology Co.	48.10	48.10	0.0%	62.61	Abdullah Al Othaim Markets Co.	11.62	11.62	0.0%	14.11
MBC Group Co.	43.30	43.30	0.0%	17.64	Abdulmohsen Alhokair Group for Tourism and Dev.	2.63	2.63	0.0%	2.94
LIVA Insurance Co.	17.46	17.46	0.0%	1.42	Advanced Petrochemical Co.	38.10	38.10	0.0%	26.47
SAL Saudi Logistics Services Co.	288.00	288.00	0.0%	160.21	Al Kathiri Holding Co.	2.63	2.63	0.0%	2.72
Lumi Rental Co.	89.40	89.40	0.0%	10.19	Al-Baha Investment and Dev Co.	0.13	0.13	0.0%	1.49

*Market closed on 18/6

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Ltd	12802.00	10.4%	14.9%	49031.66	Cie Financiere Richemont SA	288153.00	-2.6%	-10.5%	82988.06
Bidvest Group Ltd/The	28115.00	9.3%	25.3%	125392.90	BHP Group Ltd	50889.00	-2.2%	2.2%	121624.71
Capitec Bank Holdings Ltd	258921.00	9.1%	-2.9%	277045.47	MultiChoice Group	10269.00	-2.1%	8.1%	13349.70
Clicks Group Ltd	33711.00	8.9%	-16.4%	90682.59	Anglo American PLC	55225.00	-1.5%	11.3%	109897.75
Sanlam Ltd	8327.00	8.9%	10.2%	101422.86	AngloGold Ashanti Ltd	41450.00	-1.5%	0.8%	62175.00
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)
Standard Bank Group Ltd	21244.00	21244.00	0.0%	193532.84	BHP Group Ltd	50889.00	50889.00	0.0%	121624.71
Shoprite Holdings Ltd	28584.00	28584.00	0.0%	87181.20	Sasol Ltd	12802.00	12802.00	0.0%	49031.66
Sanlam Ltd	8327.00	8327.00	0.0%	101422.86	MTN Group Ltd	8585.00	8480.00	1.2%	83360.35
NEPI Rockcastle NV	13430.00	13430.00	0.0%	38678.40	Anglo American Platinum Ltd	58802.00	58007.00	1.4%	30694.64
Nedbank Group Ltd	26402.00	26402.00	0.0%	95839.26	Discovery Ltd	13297.00	12682.00	4.8%	62628.87

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
PetroVietnam Power Corp	14900.00	6.8%	32.4%	538935.42	Vietnam JSC Bank	32350.00	-1.2%	19.4%	252497.96
Vietnam National Petroleum Group	41000.00	2.8%	18.8%	60364.16	Vietnam Prosperity	18600.00	-0.8%	-3.1%	668603.98
BaoViet Holdings	45400.00	2.5%	14.9%	34182.67	FPT Corp	128000.00	-0.6%	33.2%	860576.41
Vietnam Rubber Group JSC	33950.00	1.8%	60.1%	86899.71	Vincom Retail	21100.00	-0.2%	-9.4%	130531.68
Southeast Asia Commercial JS Bank	22700.00	1.3%	-5.0%	92644.85	Vietjet Aviation	104600.00	-0.2%	-3.1%	93494.70
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	128000.00	128000.00	0.0%	860576.41	BaoViet Holdings	45400.00	45400.00	0.0%	34182.67
Bank for Inv. and Devp	46500.00	49950.00	-6.9%	68667.27	Petrovietnam Gas	78000.00	78000.00	0.0%	73574.69
Vietcombank	87100.00	96000.00	-9.3%	120151.92	Saigon Beer Alcohol Beverage Corp.	63600.00	63600.00	0.0%	46975.14
Ho Chi Minh City Devp	23700.00	27160.00	-12.7%	143141.27	Southeast Asia Commercial JS Bank	22700.00	22700.00	0.0%	92644.85
Techcombank	48800.00	56000.00	-12.9%	498666.48	Vinhomes	38300.00	38300.00	0.0%	252479.90

Email: research@fsdhgroup.com • www.fsdhgroup.com

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