

Daily Market Report

21 June 2024

JSE

JSE All-Share Index decreased by 0.79% and closed at 80,073.05 points on Thursday, as Industrial and Financial sector recorded losses.

BRVM

BRVM Composite increased by 0.89% to close at 230.30 points on Thursday, with Sogb Côte d'Ivoire and Bank of Africa - Senegal being the top gainers.

NSE

NGX All-Share Index increased by 0.002% and closed at 99,842.94 points on Thursday, as the Banking, Insurance and Consumer Goods sectors recorded gains.

EGX

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

ESG

Casablanca ESG 10 Index decreased by 0.25% to close at 953.22 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.79%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.89%
NGX Nigerian Stock Exchange	▲ 0.002%
EGX Egyptian Stock Exchange	↔ 0.00%
ESG Casablanca Stock Exchange	▼ 0.25%

African Markets

Nigeria: NGX 30 Index increased by 0.01% and closed at 3,698.53 points on Thursday. Transcorp and Guinness were the top gainers.

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

Kenya: NSE 20 Index increased by 0.11% and closed at 1,732.07 points on Thursday. East African Breweries Ltd. and I&M Group Plc were the top gainers.

South Africa: JSE Top 40 decreased by 0.72% and closed at 73,266.86 points on Thursday, as the Industrial and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	33.95%
Exchange Rate (I&E window)	₦1,485.36
INTERBANK RATES	
OPR	23.71 ▼
Overnight	24.54 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.22% to close at 8,949.84 points on Thursday, as losses in the Consumer Staples, HealthCare and Financials sectors dragged shares lower. MSCI UAE increased by 1.17% to close at 364.61 points.

Vietnam: VN-30 Index increased by 0.62% to close at 1,322.36 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam decreased by 0.19% to close at 438.25 points.

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

India: Nifty 50 index increased by 0.22% to close at 23,567.00 points on Thursday, as the Real Estate, Pharmaceuticals and Oil & Gas sectors pushed shares higher. MSCI India increased by 0.04% to close at 2,554.96.

News

Nigeria:

LASG Grants N1bn Seed Fund for Startups, Research, Innovation
Ubeta's \$550m project to expand Nigeria's domestic gas supply
Nigeria's debt rises by N24.33tn in three months

Kenya:

Storm over Sh200bn Treasury budget cuts amid blackmail claims
Export permit delays hurt Kenya-Uganda milk trade
KBC pension scheme fights lawyer's Sh1.4bn fees claim

Abu Dhabi:

Masdar signs \$3.43 billion deal to acquire Greece's 'TERNA ENERGY'
KEZAD signs lease agreement for a new facility in Abu Dhabi
Abu Dhabi grants license to Nomura's crypto unit Laser Digital

Saudi Arabia:

Saudi Arabia among leading GCC nations in Global Energy Transition Rankings
Saudi Arabia and Switzerland strengthen economic ties
Saudi Arabia leads emerging markets in bond issuance, surpassing China

Egypt:

Carlyle creates new Med oil and gas company with \$945 mln Energean deal
UAE hands over Copuos chairmanship to IGL to diversify into solar rooftop, battery recycling
Egypt's exports rise 9.8% to \$16.55bn during global trade expansion

South Africa:

Sasol and TotalEnergies win R8.5bn damages order against Transnet
Eskom granted relief on emissions limits
Caxton to oppose Media24's sale of its distribution business to Novus

India:

TCS signs deal with Xerox to transform IT Tech using cloud, GenAI
Vietnam – Brazil's priority partner in Asia: Vietnam-Russia Comprehensive Strategic Partnership
RailTel shares zoom 9% on bagging new order from South Central Railway
VN business forum in Indonesia discusses opportunities
Brazilian Vice President.

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,949.84	-0.2%	0.2%	1.0%	-6.6%	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	23,567.00	0.2%	0.4%	4.6%	8.4%	INR/USD	83.63	0.3%	0.5%
Kenya	1,732.07	0.1%	-0.7%	0.6%	15.4%	KES/USD	128.50	-0.4%	-18.2%
Nigeria	3,698.53	0.01%	-0.1%	0.6%	32.6%	NGN/USD	1,485.36	0.2%	63.7%
Saudi Arabia	11,498.93	0.0%	0.0%	-1.1%	-3.9%	SAR/USD	3.75	0.003%	0.04%
South Africa	73,266.86	-0.7%	3.9%	4.0%	3.9%	ZAR/USD	17.98	0.2%	-1.8%
Vietnam	1,322.36	0.6%	0.4%	3.6%	16.9%	VND/USD	25,455.00	0.01%	5.0%

MSCI Emerging Markets

MSCI Frontier	527.66	0.1%	0.6%	0.2%	4.1%	Brent Crude (\$)	85.71	0.4%	11.3%
MSCI Frontier 100	1,136.23	0.2%	0.6%	0.02%	-2.0%	Gold (\$)	2,369.00	1.1%	14.3%
MSCI Emerging	1,095.76	0.04%	1.8%	4.5%	7.0%	Copper (\$)	9,858.00	0.7%	15.2%
MSCI World (USD)	3,519.68	-0.1%	0.8%	2.2%	11.1%	Coffee (\$)	225.70	0.4%	27.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Cement	656.70	9.6%	105.3%	4.80	Transnational Corporation	12.00	-10.0%	38.6%	399.73
P Z Cussons	22.00	5.9%	-17.6%	2.77	Nestle	925.10	-5.8%	-15.9%	4.19
Cap	36.00	4.9%	72.7%	3.78	Total	388.90	-2.7%	1.0%	16.42
Lafarge Africa	36.10	4.0%	14.6%	64.68	United Capital PLC	20.60	-1.9%	-10.4%	95.73
Fidelity	10.40	2.6%	-4.1%	1731.72	Airtel Africa	2150.00	-1.0%	13.9%	1.40
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%	2.20	Nestle	925.10	764.90	20.9%	4.19
BUA Foods	379.90	379.90	0.0%	0.99	International Breweries	4.00	2.70	48.1%	2.36
FCMB	7.80	7.80	0.0%	42.79	Unilever	16.20	10.50	54.3%	6.44
Zenith	35.95	35.95	0.0%	447.62	Stanbic IBTC	52.00	24.50	112.2%	839.49
Wema	7.50	7.50	0.0%	13.20	Custodian	10.10	4.55	122.0%	4.96

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	1.13	7.6%	14.1%	0.01	Ras Al Khaimah Poultry & Feeding	1.44	-8.9%	2.1%	0.00
Gulf Cement Co.	0.43	7.5%	-6.5%	0.11	Phoenix Group	1.74	-2.8%	-22.3%	29.23
Sudatel Telecommunications Group Company Limited	0.24	4.3%	-20.9%	0.22	Waha Capital Company	1.49	-2.6%	-16.3%	2.83
PALMS Sports PrJSC	10.70	3.1%	-17.7%	4.71	Response Plus Holding PrJSC	4.01	-2.4%	-12.4%	7.12
RAK Co. for White Cement & Construction Materials	1.13	2.7%	-0.9%	0.07	Agility Global PLC	1.27	-2.3%	-19.6%	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 Dhafra Insurance Co.	5.80	5.80	0.0%	0.00	Sawaeed Holding P.J.S.C	6.78	6.78	0.0%	0.00
Al Buhaira National Insurance Company	3.00	3.00	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Methaq Takaful Insurance Co.	0.65	0.65	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
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Gulf Investment House Company	4.50	4.50	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 - 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 20/6

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	677.90	2.3%	10.3%	449.53	Hero Motocorp	5511.95	-2.4%	33.2%	467.06
Grasim Industries	2501.10	2.2%	17.2%	249.61	Mahindra & Mahindra	2874.05	-2.0%	66.2%	1162.86
Jsw Steel	932.00	1.9%	5.9%	289.69	Sun Pharma Industries	1477.00	-1.8%	17.3%	615.08
Bharat Petroleum	627.00	1.8%	39.1%	563.30	HDFC Life Ins. Co. Ltd	590.00	-1.0%	-8.8%	362.11
Adani Ports And Sez.	1470.75	1.5%	43.58%	718.40	NTPC	358.75	-1.0%	15.3%	515.50
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	1238.00	1243.35	-0.4%	1013.05	ITC	423.85	399.35	6.1%	618.06
Grasim Industries	2501.10	2523.70	-0.9%	249.61	Asian Paints	2914.80	2670.10	9.2%	328.30
Tata Steel	182.75	184.60	-1.0%	706.45	Bajaj Finserv	1587.50	1419.05	11.9%	260.85
ICICI Bank	1156.60	1173.00	-1.4%	1777.46	LTIMINDTREE Ltd	5052.00	4513.55	11.9%	167.95
Shriram Finance Limited	2810.00	2854.50	-1.6%	390.87	HUL	2481.00	2172.05	14.2%	535.84

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Ltd.	152.75	8.9%	34.0%	0.52	BK Group Plc	31.00	-9.4%	-13.4%	0.03
I&M Group Plc	21.40	4.4%	22.3%	34.78	Stanbic Holdings	113.75	-1.3%	4.6%	0.59
Kenya Reinsurance Corporation Ltd	2.79	1.1%	48.4%	3.32	Kenya Power & Lighting Limited	1.71	-1.2%	20.4%	0.12
Safaricom Plc	18.70	1.1%	34.5%	120.85	CIC Insurance Group Ltd	2.18	-0.9%	-3.5%	0.18
Bamburi Cement Limited	42.00	0.8%	17.2%	39.19	Kengen Limited	2.40	-0.4%	19.4%	0.87
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	14.05	14.30	-1.7%	14.45	Centum Investment Company Plc	8.76	7.60	15.3%	0.30
Standard Chartered Bank Kenya Ltd	195.75	200.00	-2.1%	6.89	BK Group Plc	31.00	26.50	17.0%	0.03
Kenya Power & Lighting Limited	1.71	1.85	-7.6%	0.12	Kengen Limited	2.40	1.94	23.7%	0.87
NCBA Group Plc	41.15	45.00	-8.6%	0.56	Stanbic Holdings	113.75	90.00	26.4%	0.59
Total Kenya Ltd	23.70	26.00	-8.8%	0.06	Equity Group Holdings Plc	43.50	33.70	29.1%	25.17

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 20/6

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum Holdings Ltd	11998.00	3.5%	-19.9%	57710.38	Absa Group Ltd	17326.00	-5.2%	21.5%	238579.02
Anglo American Platinum Ltd	62068.00	3.4%	2.2%	46923.41	Woolworths Holdings Ltd	6136.00	-3.9%	24.2%	63814.40
Anglo American PLC	56866.00	2.4%	11.3%	218934.10	Old Mutual Ltd	1211.00	-3.1%	-12.5%	57147.09
Sasol Ltd	13441.00	2.2%	14.9%	89382.65	Sanlam Ltd	8065.00	-3.1%	10.2%	179930.15
Aspen Pharmacare Holdings Ltd	24700.00	2.2%	5.4%	89167.00	MTN Group Ltd	8569.00	-2.7%	-3.9%	141816.95
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	21139.00	21139.00	0.0%	233163.17	Sasol Ltd	13441.00	13441.00	0.0%	89382.65
Shoprite Holdings Ltd	29050.00	29050.00	0.0%	139440.00	BHP Group Ltd	51650.00	51209.00	0.9%	105882.50
Sanlam Ltd	8065.00	8065.00	0.0%	179930.15	MTN Group Ltd	8569.00	8480.00	1.0%	141816.95
NEPI Rockcastle NV	13373.00	13373.00	0.0%	65126.51	Woolworths Holdings Ltd	6136.00	5824.00	5.4%	63814.40
Nedbank Group Ltd	26368.00	26368.00	0.0%	142914.56	Discovery Ltd	13430.00	12682.00	5.9%	82057.30

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Prosperity	19700.00	3.7%	2.6%	1286049.64	Techcombank	24800.00	-48.7%	-22.0%	858856.37
Investment & Industrial Development JS Corp.	64000.00	2.1%	1.7%	93643.11	Vincom Retail	20250.00	-1.9%	-13.1%	257399.23
Southeast Asia Commercial JS Bank	23250.00	1.5%	-2.7%	104443.29	Tien Phong Commercial JS Bank	18250.00	-1.6%	4.9%	161931.32
FPT Corp	133300.00	1.4%	38.7%	1404641.97	BaoViet Holdings	45250.00	-1.2%	14.6%	33095.06
Vietnam Rubber Group JSC	34000.00	1.2%	60.4%	86223.58	Vietnam JSC Bank	32200.00	-0.9%	18.8%	227087.99
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	133300.00	133300.00	0.0%	1404641.97	BaoViet Holdings	45250.00	45250.00	0.0%	33095.06
Bank for Inv. and Devp	45500.00	49950.00	-8.9%	121798.11	Petrovietnam Gas	78000.00	78000.00	0.0%	65136.93
Vietcombank	86000.00	96000.00	-10.4%	227709.28	Saigon Beer Alcohol Beverage Corp.	62100.00	62100.00	0.0%	58444.40
Ho Chi Minh City Devp	23600.00	27160.00	-13.1%	183056.09	Tien Phong Commercial JS Bank	18250.00	18250.00	0.0%	161931.32
Saigon-Hanoi Commercial Bank	11600.00	13600.00	-14.7%	181968.50	Vinhomes	38000.00	38000.00	0.0%	286219.79

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