

Daily Market Report

5 June 2024

JSE

JSE All-Share Index decreased by 1.17% and closed at 76,832.74 points on Tuesday, as the Industrial, Financial and Resource sectors recorded losses.

BRVM

BRVM Composite increased by 0.33% to close at 225.95 points on Tuesday, with BICI Côte d'Ivoire and Sitab Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index decreased by 0.07% to close at 99,051.02 points on Tuesday, as the Insurance and Banking sectors recorded losses.

EGX

The EGX 30 Index increased by 0.52% and closed at 26,973.00 points on Tuesday, as market gained LE 12 billion of market cap amid Egyptian buying.

ESG

Casablanca ESG 10 Index decreased by 0.74% to close at 957.42 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.17%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.33%
NGX Nigerian Stock Exchange	▼ 0.07%
EGX Egyptian Stock Exchange	▲ 0.52%
ESG Casablanca Stock Exchange	▼ 0.74%

African Markets

Nigeria: NGX 30 Index decreased by 0.06% and closed at 3,664.97 points on Tuesday. UBA and Zenith were the top losers.

Egypt: The EGX 30 Index increased by 0.52% and closed at 26,973.00 points on Tuesday, as market gained LE 12 billion of market cap amid Egyptian buying.

Kenya: NSE 20 Index increased by 0.85% and closed at 1,740.25 points on Tuesday. Kenya Power & Lighting Limited and NCBA Group Plc were the top gainers.

South Africa: JSE Top 40 decreased by 1.21% and closed at 70,562.21 points on Tuesday, as the Industrial, Financial and Resource sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	33.69%
Exchange Rate (I&E window)	₦1,476.95
INTERBANK RATES	
OPR	27.94 ▼
Overnight	28.50 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.01% to close at 8,918.51 points on Tuesday, as gains in the Consumer Staples, Telecommunication, and Energy sectors pushed shares higher. MSCI UAE increased by 0.12% to close at 355.33 points.

Vietnam: VN-30 Index increased by 0.25% to close at 1,300.99 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.18% to close at 447.87 points.

Saudi Arabia: Tadawul All Share Index decreased by 1.66% to close at 11,612.03 points on Tuesday, as losses in the Insurance, Materials, and Energy sectors dragged shares lower. MSCI Saudi Arabia decreased by 1.62% to close at 1,453.42 points.

India: Nifty 50 index decreased by 5.93% to close at 21,884.50 points on Tuesday, as the Oil & Gas, Metal and Real Estate sectors dragged shares lower. MSCI India decreased by 6.92% to close at 2,351.63.

News

Nigeria:

Oil investors wrestle 20 agencies in dollar-starved Nigeria
OPEC extends oil production cut
Iran ramps up oil exports as Nigeria drags

Kenya:

KRA shakes US firm with Sh10bn claim
Konza's Digital Media City bags Sh37 billion funding from Korea
State plans second Sh130bn Eurobond buyback in 2024

Abu Dhabi:

ADFD and AIB host workshops to enhance climate action initiatives
ADSS joins ADX as the 33rd market member
UAE President meets Afghanistan's Interior Minister in Abu Dhabi

Saudi Arabia:

Saudi investors sign 92-year-deal for Saudi Logistics City at Djibouti port
Saudi's Mawani signs deal with Port of Marseille Fos to enhance international trade
Saudi Arabia, Kuwait finalize project to streamline customs procedures

Egypt:

Industry Minister engages with global steel companies for investment opportunities
Egypt launches international tender within days to import 15 LNG shipments
EHA boosts cooperation with Allianz Partners Medtronic in the healthcare field

South Africa:

Fitch warns against radical policies, but bankers project stability
Labour appeal court finds Coca-Cola retrenchments were justified
Pan African Resources strikes five-year wage deal with NUM

India:

Tata Motors upsills 20% of workforce in new-age auto capabilities
India's services sector softens to five-month low in May
India to drag Australia to WTO arbitration on services trade commitments

Vietnam:

RoK businesses seek opportunities in the Vietnamese market
Việt Nam's semiconductor industry poised to bolster industrial real estate
Việt Nam leads the region in attracting long-term invest. into innovative startups

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,918.51	0.01%	0.6%	0.6%	-6.9%	AED/USD	3.67	0.0%	-0.02%
Egypt	26,973.00	0.5%	0.5%	0.4%	8.6%	EGP/USD	47.45	0.7%	53.2%
India	21,884.50	-5.9%	-2.9%	-2.9%	0.7%	INR/USD	83.63	0.6%	0.5%
Kenya	1,740.25	0.8%	1.0%	1.0%	15.9%	KES/USD	131.00	0.4%	-16.6%
Nigeria	3,664.97	-0.1%	-0.3%	-0.3%	31.3%	NGN/USD	1,476.95	0.1%	62.8%
Saudi Arabia	11,612.03	-1.7%	-1.7%	-0.1%	-3.0%	SAR/USD	3.75	0.0%	0.01%
South Africa	70,562.21	-1.2%	0.2%	0.2%	0.1%	ZAR/USD	18.73	1.1%	2.3%
Vietnam	1,300.99	0.2%	2.0%	2.0%	15.0%	VND/USD	25,415.00	-0.1%	4.8%

MSCI Emerging Markets

MSCI Frontier	528.72	-0.1%	0.4%	0.4%	4.3%	Brent Crude (\$)	77.52	-1.1%	0.6%
MSCI Frontier 100	1,139.13	-0.2%	0.3%	0.3%	-1.7%	Gold (\$)	2,347.40	-0.9%	13.3%
MSCI Emerging	1,051.96	-1.6%	0.3%	0.3%	2.8%	Copper (\$)	9,945.00	-2.0%	16.2%
MSCI World (USD)	3,453.71	0.0%	0.2%	0.2%	9.0%	Coffee (\$)	225.09	2.0%	27.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Okomu Oil	255.70	9.7%	-1.7%	29.88	Custodian	9.95	-5.7%	10.6%	15.65
Nestle	905.00	0.6%	-17.7%	44.11	Zenith	32.00	-3.6%	-17.2%	201.48
					Airtel Africa	2150.00	-2.0%	13.9%	2426.46
					Geregu Power	1000.00	-1.7%	150.6%	228.41
					FCMB	8.00	-1.6%	8.1%	117.88
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%	228.41	Nestle	905.00	764.90	18.3%	44.11
BUA Foods	379.90	379.90	0.0%	1.12	International Breweries	3.70	2.70	37.0%	2.55
FCMB	8.00	8.00	0.0%	117.88	Unilever	15.05	10.50	43.3%	1.02
Zenith	32.00	32.00	0.0%	201.48	Stanbic IBTC	52.00	24.50	112.2%	70.15
Wema	6.75	6.75	0.0%	21.77	Custodian	9.95	4.55	118.7%	15.65

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Co. for Building Materials	0.27	11.5%	12.0%	0.57	AL KHALEEJ Investment	1.80	-10.0%	-13.0%	0.04
Hayah Insurance Company	1.15	7.5%	16.2%	0.005	Gulf Cement Co.	0.40	-5.7%	-13.9%	0.00
PALMS SPORTS PrJSC	10.36	6.6%	-20.3%	1.0865	GFH Financial Group	1.12	-2.6%	23.2%	1.64
Response Plus Holding PrJSC	3.81	4.4%	-16.8%	7.37	ESHRAQ Inv.	0.31	-2.2%	-29.9%	4.45
ADNOC Drilling Company PJSC	4.17	3.5%	10.3%	81.37	Multiply Group	1.84	-2.1%	-42.1%	59.70
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 Wathba National Insurance Co.	5.75	5.75	0.0%	0.00	ANAN Inv. Hldg	4.07	4.07	0.0%	0.00
Al Dhafra Insurance Co.	5.80	5.80	0.0%	0.00	Sawaeed Holding	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 Ins. Co.	210.00	210.00	0.0%	0.00	Multiply Group	1.84	1.84	0.0%	59.70
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£)
Alexandria Containers and goods	39.09	4.7%	-23.1%	28.33	QALA For Financial Investments	1.93	-2.0%	-28.8%	149.47
Palm Hills Development Company	3.85	4.1%	44.7%	105.48	Sidi Kerir Petrochemicals	29.40	-1.7%	1.1%	52.80
Egyptian Kuwaiti Holding	31.73	3.5%	-21.2%	15.70	E-finance For Digital and Financial Inv.	24.51	-1.1%	40.1%	6.45
EFG Holding	17.60	3.4%	7.8%	416.02	Ibnsina Pharma	2.72	-1.1%	-13.4%	38.34
Misr Fertilizers Production Company	42.31	3.1%	-34.1%	259.46	Madinet Masr For Housing and Dev.	3.72	-0.8%	-8.4%	55.26
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	42.31	42.31	0.0%	259.46	Egyptian Kuwaiti Holding	31.73	31.73	0.0%	15.70
Commercial International Bank	76.10	76.10	0.0%	349.66	QALA For Financial Investments	1.93	1.75	10.3%	149.47
ELSWEDY Electric	46.80	49.00	-4.5%	202.54	Belton Financial Holding	2.89	2.38	21.4%	44.97
Heliopolis Housing	11.41	13.95	-18.2%	124.32	EFG Holding	17.60	13.90	26.6%	416.02
Oriental Weavers	21.60	26.96	-19.9%	28.73	Alexandria Mineral Oils Company	9.30	6.95	33.8%	46.85

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2492.15	5.8%	-6.4%	1920.05	Adani Ports And Sez.	1245.00	-21.4%	21.5%	6969.25
Britannia Inds.	5339.90	3.3%	0.0%	521.72	Adani Ent. Ltd	2950.00	-19.1%	3.5%	6369.18
Nestle India Limited	2432.15	3.3%	-90.8%	371.72	ONGC	238.00	-16.2%	16.1%	1796.57
Hero Motocorp	5323.90	3.2%	28.6%	1012.53	NTPC	334.90	-14.5%	7.6%	2884.83
Tata Consumer products ltd.	1087.10	1.7%	0.0%	346.45	Coal India	443.00	-13.5%	17.8%	2173.77
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Hero Motocorp	5323.90	5349.00	-0.5%	1012.53	LTIMINDTREE Ltd	4630.00	4513.55	2.6%	314.53
Bajaj Auto	9299.95	9444.00	-1.5%	675.38	HDFC Life Ins. Company Ltd	535.55	511.40	4.7%	525.35
Mahindra & Mahindra	2584.00	2654.35	-2.7%	1629.84	Bajaj Finserv	1489.40	1419.05	5.0%	655.47
Divi's Laboratories Limited	4327.20	4467.50	-3.1%	367.08	ITC	419.85	399.35	5.1%	1910.74
Cipla	1465.00	1519.00	-3.6%	298.52	Bajaj Finance	6550.00	6187.80	5.9%	2185.10

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.72	3.6%	21.1%	0.56	East African Breweries Limited	151.50	-4.1%	32.9%	0.35
NCBA Group Plc	43.20	2.9%	10.9%	0.16	Total Kenya Ltd	21.60	-2.0%	20.0%	0.04
CIC Insurance Group Ltd	2.30	2.7%	1.8%	2.12	British American Tobacco Kenya Ltd	365.75	-0.8%	-10.2%	5.30
Stanbic Holdings	113.00	2.5%	3.9%	0.09	Centum Investment Company Plc	8.66	-0.7%	3.1%	0.27
I&M Group Plc	20.70	2.2%	18.3%	6.51	Kengen Limited	2.39	-0.4%	18.9%	2.12
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	13.75	14.30	-3.8%	0.80	British American Tobacco Kenya Ltd	365.75	400.00	-8.6%	5.30
NCBA Group Plc	43.20	45.00	-4.0%	0.16	Centum Investment Company Plc	8.66	7.60	13.9%	0.27
Standard Chartered Bank Kenya Ltd	187.00	200.00	-6.5%	16.19	Kengen Limited	2.39	1.94	23.2%	2.12
Kenya Power & Lighting Limited	1.72	1.85	-7.0%	0.56	Stanbic Holdings	113.00	90.00	25.6%	0.09
CIC Insurance Group Ltd	2.30	2.53	-9.1%	2.12	Equity Group Holdings Plc	43.65	33.70	29.5%	76.36

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
SAL Saudi Logistics Services Co.	270.40	2.7%	39.1%	179.62	Al-Baha Inv and Development Co.	0.13	-7.1%	-7.1%	1.37
Middle East Healthcare Co.	81.20	2.5%	-8.0%	47.34	Al-Rajhi Company for Cooperative Ins. National Co. for Learning and Education	154.20	-5.8%	117.2%	109.61
Tanmiah Food Co.	124.80	2.5%	21.2%	19.13	Arabian Drilling Co.	153.60	-5.4%	29.9%	7.70
Saudi Printing and Packaging	14.20	2.2%	-8.7%	5.05	Perfect Presentation for Commercial Services Co.	130.00	-5.1%	-31.9%	90.61
Leejam Sports Co.	203.60	1.9%	0.1%	54.03		29.75	-5.0%	21.2%	23.20
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)
Sustained Infrastructure Holding Co.	36.60	36.60	0.0%	31.83	Abdullah Al Othaim Markets Co.	11.12	11.12	0.0%	27.12
MBC Group Co.	46.50	46.50	0.0%	56.80	Abdulmohsen Alhokair Group for Tourism and Dev.	2.51	2.51	0.0%	5.04
LIVA Insurance Co.	17.78	17.78	0.0%	1.96	Advanced Petrochemical Co.	40.15	40.15	0.0%	33.29
SAL Saudi Logistics Services	270.40	270.40	0.0%	179.62	Al Kathiri Holding Co.	2.67	2.67	0.0%	3.34
Lumi Rental Co.	90.40	90.40	0.0%	18.59	Al-Baha Inv. and Development Co.	0.13	0.13	0.0%	1.37

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Discovery Ltd	11326.00	3.3%	44.1%	26842.62	Northam Platinum Holdings Ltd	11647.00	-10.2%	-19.9%	29932.79
Capitec Bank Holdings Ltd	219843.00	3.2%	-2.9%	53202.01	Sibanye Stillwater Ltd	2151.00	-8.9%	-21.5%	44461.17
Standard Bank Group Ltd	18462.00	3.0%	19.6%	74771.10	Impala Platinum Holdings Ltd	8857.00	-7.9%	22.9%	47739.23
Absa Group Ltd	15363.00	3.0%	21.5%	36256.68	Sasol Ltd	11600.00	-6.5%	14.9%	62292.00
Remgro Ltd	12413.00	2.8%	-10.4%	28549.90	Anglo American Platinum Ltd	58055.00	-4.9%	2.2%	48069.54
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	68985.00	68985.00	0.0%	61465.64	Discovery Ltd	11326.00	11326.00	0.0%	26842.62
Naspers Ltd	382500.00	382500.00	0.0%	176332.50	MTN Group Ltd	8170.00	8170.00	0.0%	42402.30
Mr Price Group Ltd	18241.00	18241.00	0.0%	26996.68	Remgro Ltd	12413.00	12413.00	0.0%	28549.90
Capitec Bank Holdings Ltd	219843.00	219843.00	0.0%	53202.01	Sasol Ltd	11600.00	11600.00	0.0%	62292.00
Aspen Pharmacare Holdings Ltd	23460.00	23460.00	0.0%	26979.00	Woolworths Holdings Ltd	5572.00	5572.00	0.0%	25185.44

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
PetroVietnam Power Corp	14000.00	4.1%	24.4%	495715.51	Asia Commercial JS Bank	24500.00	-1.2%	2.5%	239436.75
Saigon Beer Alcohol Beverage Corp.	61400.00	3.4%	-2.5%	142294.34	Investment & Industrial Dev. JSC	62300.00	-1.1%	-1.0%	29796.62
FPT Corp	139100.00	1.6%	44.7%	973897.70	Vincom Retail	22100.00	-0.9%	-5.2%	107636.02
BaoViet Holdings	45850.00	1.1%	16.1%	45691.04	Vietnam Prosperity	18200.00	-0.6%	-5.2%	166585.49
Hoa Phat Group JSC	29300.00	1.0%	4.8%	1167516.38	Military Commercial Bank	22500.00	-0.4%	20.6%	204505.92
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	139100.00	139100.00	0.0%	973897.70	BaoViet Holdings	45850.00	45850.00	0.0%	45691.04
Bank for Inv. and Devp	47600.00	49950.00	-4.7%	53219.11	Petrovietnam Gas	80800.00	80800.00	0.0%	122964.53
Vietcombank	88700.00	96000.00	-7.6%	161253.84	Saigon Beer Alcohol Beverage Corp.	61400.00	61400.00	0.0%	142294.34
Ho Chi Minh City Devp	23950.00	27160.00	-11.8%	116461.17	Southeast Asia Commercial JS Bank	21600.00	21600.00	0.0%	34174.01
Vietnam JSC Bank	32800.00	38200.00	-14.1%	289677.83	Tien Phong Commercial JS Bank	18050.00	18050.00	0.0%	80653.36

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