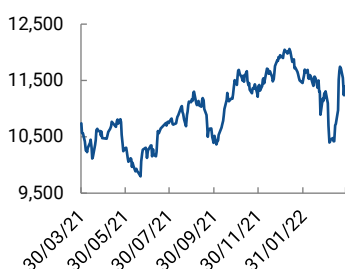


EGYPT MARKET WRAP

EGX30 index summary

6M avg. daily value (EGPmn)	527
No. of shares (bn)	221
Market cap (USDmn)	23,585
Market cap (EGPmn)	431,613
USD:EGP	18.30

EGX30 index performance



Source: EGX

30 March 2022

Market performance. The EGX failed to build on yesterday's momentum, after Qatar pledged to invest USD5bn in Egypt. The market could not extend recent gains, as heavy selling pressure came towards mid-session. Overall sentiment soured as blue chips led the market decline, albeit on low volumes, with the main gauge ending the day 1.35% lower. MM Group (MTIE), -2.62%, extended its lacklustre performance after reporting disappointing 4Q earnings. Institutional investors grabbed a staggering 75% of today's total activity, which included a block trade in Fawry (FWRY) early on. Gulf retail investors ended the day EGP9mn net sellers, leading the EGX70 0.63% down. The equal weighted EGX100 index lost 0.97%.

Turnover and flows. In terms of activity, market turnover were inflated, at EGP1.8bn, fuelled by the block trade in FWRY. The figure comes at an 80% beat to its 90-day average. Banks topped the sectors' turnover standings, grabbing a 13% share of total value traded. The bulk came on Commercial International Bank (COMI) trading ~2mn shares, worth EGP92mn. Real estate came in a close second, as Heliopolis Housing (HELI) and Talaat Moustafa Group (TMGH) contributed most to activity, trading EGP41mn and EGP13mn, respectively. Basic resources finished third, on sustained activity in both Abu Qir Fertilizers (ABUK) and Ezz Steel (ESRS). The names traded a combined EGP36mn, accounting for ~5% of total EGX value traded.

Gainers and losers. The EGX30 closed the day on a 1.35% loss, pressured by increased institutional selling. Only six names finished the day in green territory. Citadel Capital (CCAP) was the top performer, +1.42%, benefitting from increased retail appetite. Orascom Construction (ORAS) extended its recent strong run, gaining 1.33%, on sustained institutional inflows. Oriental Weavers (ORWE) +1.26% also witnessed increased buying, recovering from recent losses, albeit on lower-than-average volume. Renewed Gulf institutional interest led favourite Telecom Egypt (ETEL) to a marginal 0.64% gain. TMGH closed on a flattish 0.12% gain, to close out the EGX30 top performers. In the red, GB Auto (AUTO) continued to slide, finishing as the EGX30's worst performer, losing 3.75%. The restrictions applied on imported luxury good continued to weigh on the stock's performance. Rameda (RMDA) slipped 3.06% as bearish sentiment in the name continued to pressure the stock further. MTIE sustained its downtrend as 4Q21 results came well below expectations, with earning plunging 43% y-o-y. The stock lost 2.62% on the session. COMI lost 2.53% as non-Arab foreign institutions were heavy passive net sellers, taking an EGP1.1bn net sell position. Madinet Nasr Housing Development (MNHD) closed out the session's worst performers on a 2.18% loss.

Key Indices Performance

Index	Open	High	Low	Close	Change (%)
EGX 30	11,393	11,457	11,224	11,239	(1.35)
EGX 70	1,928	1,936	1,917	1,917	(0.57)
EGX 100	2,918	2,934	2,898	2,900	(0.63)

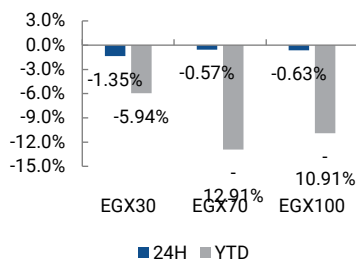
Source: EGX

CI Capital Brokerage

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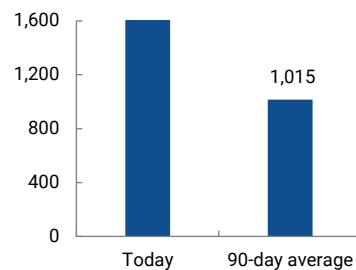
EGX Market Snapshot

Key Indices Performance



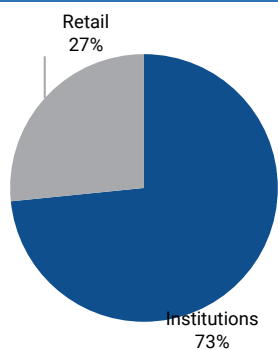
Source: EGX

Market Turnover (EGPmn)



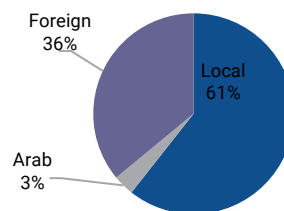
Source: EGX

Trading Activity by Investor Type



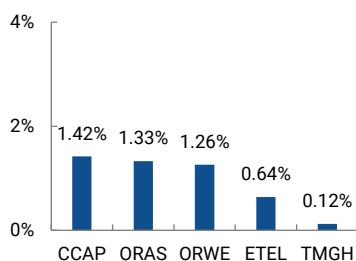
Source: EGX

Trading Activity by Nationality



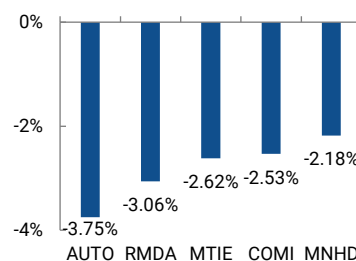
Source: EGX

EGX30 Top Performing Stocks



Source: EGX

EGX30 Worst Performing Stocks



Source: EGX

Select EGX Stocks' Performance

	Reuters	Bloomberg	Company	Market Cap (EGPmn)	Market Cap (USDmn)	GM ADTV (USD)	Open Price	Closing Price	Change (%)	52-week High	52-week Low	1M Change (%)	6M Change (%)	12M Change (%)
Financials														
	CICH.CA	CICH EY	CI Capital	3,910	214	238,601	3.97	3.91	(1.51)	5.61	2.97	4.27	(9.91)	11.08
	COMI.CA	COMI EY	CIB	92,148	5,053	7,332,909	47.40	46.77	(1.33)	54.15	36.53	(2.18)	9.63	5.75
	CIEB.CA	CIEB EY	Crédit Agricole Egypt	9,300	510	417,161	7.48	7.44	(0.53)	9.00	5.24	(5.70)	16.30	29.32
	HRHO.CA	HRHO EY	ERG Hermes	16,931	928	1,544,540	17.82	17.40	(2.36)	18.80	10.63	0.29	43.09	42.72
	HDBK.CA	HDBK EY	Housing & Dev Bank	6,420	352	150,875	42.15	42.29	0.33	47.97	27.50	4.39	7.12	45.16
	QNBA.CA	QNBA EY	QNB Al Ahli	37,386	2,050	15,189	18.00	17.35	(3.61)	20.00	13.00	1.94	5.02	7.03
Fintech & telecom														
	EFIH.CA	EFIH EY	E-finance	31,929	1,751		17.98	17.96	(0.11)	25.20	0.50	(0.99)		
	FWRY.CA	FWRY EY	Fawry	16,954	930	2,318,969	10.03	9.93	(1.00)	25.99	8.47	2.69	(30.12)	(46.65)
	ETEL.CA	ETEL EY	Telecom Egypt	29,959	1,643	784,318	17.30	17.55	1.45	19.75	10.70	(0.74)	24.12	56.00
Real Estate														
	EMFD.CA	EMFD EY	Emaar Msr	12,546	688	351,953	2.74	2.77	1.09	3.25	2.12	5.32	15.42	19.40
	HELI.CA	HELI EY	Heliopolis Housing	7,850	430	2,215,541	5.88	5.88	-	7.40	3.97	18.55	18.07	23.53
	MNHD.CA	MNHD EY	Madinet Nasr Housing	3,699	203	975,658	2.29	2.27	(0.87)	3.27	1.82	17.80	(2.98)	(27.50)
	ORHD.CA	ORHD EY	ODE	4,748	260	295,995	4.22	4.20	(0.47)	6.22	3.71	(3.89)	(15.83)	(22.37)
	PHDC.CA	PHDC EY	Palm Hills	4,853	266	330,171	1.58	1.58	(0.38)	2.12	1.43	4.51	(18.81)	(4.20)
	OCDI.CA	OCDI EY	SODIC	4,274	234	158,546	12.08	12.00	(0.66)	19.95	11.29	(8.26)	(35.10)	(26.87)
	TMGH.CA	TMGH EY	TMG	17,231	945	1,201,420	8.35	8.35	-	9.99	5.41	(10.79)	13.14	30.47
Consumer														
	POUL.CA	POUL EY	Cairo Poultry	1,207	66	175,789	2.53	2.52	(0.40)	4.56	2.37	3.28	(29.61)	(14.86)
	DICE.CA	DICE EY	Dice	304	17	164,507	0.58	0.57	(0.17)	1.87	0.50	(1.88)	(43.67)	(59.97)
	DOMT.CA	DOMT EY	Domty	1,111	61	180,777	3.90	3.93	0.77	4.63	3.40	(0.51)	(4.84)	(12.67)
	EAST.CA	EAST EY	Eastern Tobacco	27,000	1,480	1,004,330	12.00	12.00	-	12.77	10.26	10.60	(1.96)	5.17
	EFID.CA	EFID EY	Edita	5,531	303	218,227	7.50	7.65	2.00	8.78	6.55	2.27	9.29	(9.89)
	JUFO.CA	JUFO EY	Juhayna	6,797	373	394,667	7.20	7.22	0.28	7.67	3.97	16.26	28.93	26.22
	MTIE.CA	MTIE EY	MTI	3,974	218	1,043,028	4.20	4.11	(2.14)	8.30	3.96	(30.22)	(37.54)	(48.98)
	OLFI.CA	OLFI EY	Obour Land	2,360	129	173,195	5.96	5.90	(1.01)	7.30	4.73	(1.17)	11.32	(8.24)
	ORWE.CA	ORWE EY	Oriental Weavers	5,833	320	276,344	8.71	8.77	0.69	9.42	5.78	7.21	0.57	19.32
Education														
	CIRA.CA	CIRA EY	CIRA	6,055	332	534,186	10.39	10.39	-	14.85	9.51	(6.65)	(14.77)	(20.99)
	TALM.EY	TALM EY	Taaleem	2,717	149	258,760	3.70	3.72	0.54	6.22	1.00	3.05	(23.14)	
Healthcare														
	CLHO.CA	CLHO EY	Cleopatra Hospitals Group	8,000	439	574,534	5.00	5.00	-	5.25	3.70	5.93	11.61	6.38
	PHAR.CA	PHAR EY	EIPICO	3,818	209	115,743	38.50	38.50	-	49.00	37.01	(0.08)	(12.24)	(9.45)
	ISPH.CA	ISPH EY	Ibnsina Pharma (ISP)	2,736	150	392,282	2.86	2.85	(0.35)	4.60	2.82	(13.90)	(13.64)	(37.09)
	IDHC.CA	IDHC EY	IDH	12,000	658	56,894	19.03	20.00	5.10	22.00	3.94	1.11	5.26	
	RMDA.CA	RMDA EY	Rameda	1,880	103	399,233	1.96	1.88	(4.08)	2.93	1.62	(11.74)	(9.18)	(9.74)
	SPMD.CA	SPMD EY	Speed Medical	821	45	1,113,360	0.74	0.74	0.14	3.00	0.70	(28.85)	(58.10)	(74.74)
Industrials														
	AMOC.CA	AMOC EY	AMOC	5,295	290	787,812	4.18	4.10	(1.91)	4.48	2.33	15.49	7.89	57.09
	CCAP.CA	CCAP EY	Qalaa Holding	3,838	210	876,216	1.27	1.29	1.74	1.58	1.09	(7.19)	12.76	2.79
	SKPC.CA	SKPC EY	Sidi Kerir Petrochemicals	5,588	306	796,378	8.85	8.87	0.23	10.88	6.33	21.01	19.73	4.76
Fertilizers														
	ABUK.CA	ABUK EY	Abu Qir Fertilizers	31,888	1,748	1,479,011	25.40	25.27	(0.51)	27.50	17.90	20.45	27.11	18.19
	EFIC.CA	EFIC EY	EFIC	1,281	70	135,360	17.09	17.60	2.98	17.68	9.65	23.86	30.08	56.58
	EKHO.CA	EKHO EY	EK Holding	26,835	1,466	577,635	1.33	1.33	0.30	1.49	0.94	(5.21)	15.36	27.45
	EKHOA.CA	EKHOA EY	EK Holding	26,740	1,466	1,074,989	23.00	23.00	-	24.15	17.25	9.73		
	KIMA.CA	KIMA EY	KIMA	4,675	256	120,370	4.04	3.94	(2.48)	5.00	2.64	18.67	3.68	14.53
	MFPC.CA	MFPC EY	MOPCO	23,599	1,294	592,547	102.99	103.00	0.01	110.00	64.05	15.89	17.07	42.40
Construction & materials														
	ARCC.CA	ARCC EY	Arabian Cement	1,553	85	100,906	4.31	4.10	(4.87)	6.18	2.70	(2.38)	(1.20)	39.93
	SWDY.CA	SWDY EY	Elsewedy Electric	17,452	957	1,342,941	8.01	7.99	(0.25)	10.03	7.40	(3.73)	(2.20)	(13.34)
	ESRS.CA	ESRS EY	Ezz Dekheila	7,932	435	1,155,895	14.68	14.60	(0.54)	17.24	8.70	10.27	13.44	56.15
	IRAX.CA	IRAX EY	Ezz Steel	10,517	577	56,124	541.19	538.99	(0.41)	580.00	310.01	28.59	35.28	49.27
	ORAS.CA	ORAS EY	Orascom Construction	9,026	495	321,968	75.00	77.30	3.07	90.90	64.00	10.46	4.53	(13.14)
Transport														
	ALCN.CA	ALCN EY	Alex Containers	16,089	882	311,473	10.84	10.80	(0.37)	11.18	5.85	66.15	29.19	54.07
	CSAG.EY	CSAG EY	Canal Shipping	2,416	132	51,335	12.16	12.08	(0.66)	21.20	8.56	17.74	(35.85)	18.20
	AUTO.CA	AUTO EY	GB Auto	4,354	239	658,770	4.00	3.98	(0.50)	6.06	3.14	(30.90)	(7.87)	2.58

Source: EGX