

Daily Market Report

18 November 2021

JSE

JSE All-Share Index inched up by 0.01% to close at 70,942.31 points on Wednesday, as Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 193.21 points, up by 0.61% on Wednesday with CFAO Motors Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NSE All-Share Index decreased by 0.22% to close at 43,349.90 points on Wednesday, as Oil and gas, Insurance, Banking and Consumer goods sectors recorded losses.

EGX

EGX 30 Index increased 0.35% to close at 11,453.30 points on Wednesday, as the market gained LE 3.55 billion to market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index was up by 0.12% to close at 997.41 points on Wednesday.

African Markets

Nigeria: NSE 30 Index declined by 0.20% and closed at 1,766.30 points on Wednesday. Unilever and Access were the top losers.

Egypt: EGX 30 Index increased 0.35% to close at 11,453.30 points on Wednesday, as the market gained LE 3.55 billion to market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index declined by 0.57% and closed at 1,900.18 points on Wednesday. Stanbic Holdings and Bamburi Cement were the top losers.

South Africa: JSE Top 40 Index increased marginally by 0.09% to close at 64,337.17 points on Wednesday, as Financial and Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.01%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.61%

NSE
Nigerian Stock Exchange ▼ 0.22%

EGX
Egyptian Stock Exchange ▲ 0.35%

ESG
Casablanca Stock Exchange ▲ 0.12%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.57
INTERBANK RATES	
OBB	13.00 ▼
Overnight	13.95 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.17% to close at 8,337.69 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index declined by 0.37% to close at 450.42 points.

Vietnam: VN-30 Index increased by 0.16% to close at 1,519.58 points on Wednesday, as the blue-chip companies recorded gains. MSCI Vietnam rose by 0.49% to close at 1,070.17 points.

Saudi Arabia: Tadawul All Share Index inched up by 0.05% to close at 11,833.54 points on Wednesday, as gains in the Real Estate Development, Hotels & Tourism and Telecoms & IT sectors led shares higher. MSCI Saudi Arabia slipped by 0.03% to close 1,646.77 points.

India: Nifty 50 market decreased 0.56% to close at 17,898.65 points on Wednesday, as losses in the Real Estate, Oil & Gas and Banking sectors pushed shares lower. MSCI India declined by 0.50% to close at 2,097.07 points.

News

Nigeria:

Fuel marketing firms' nine-month revenue surges to N594bn
FIRS approves N5.61bn capital allowance for 13 firms, loses N1.68bn
October Revenue Drops as FG, States, LGs Share N671.910bn

Kenya:

Gov't to Offer 3rd Economic Stimulus Package Worth KSh26.2 Billion
KCB Group Q3 2021 Net Earnings Rise 131% to Hit KSh 25.2 bn
StanChart Bank Kenya Q3, 2021 Net Earnings up 46.67% to KSh 6.36 bn

Abu Dhabi:

Adnoc and Taqa to form global renewables and hydrogen venture
Abu Dhabi's NPCC signs deal to explore opportunities in UAE and Egypt
Bank of Sharjah posts Dh175m in pre-provision net profit in Q3

Saudi Arabia:

SABB, EXIM sign insurance deal to facilitate exports
Al Rajhi Takaful signs bancassurance deal with Al Rajhi Bank
ACWA Power to close financing for TRSDC project before year end

Egypt:

Egypt's FRA reduces fees for trading operations in EGX by 20%
Egypt to start export 60-65 mcf/day of gas to Lebanon by 2022
EFG Hermes' profits rise 32% in 9M

South Africa:

SA inflation unchanged before key rate decision
MTN to sell SA towers to IHS for R6.4bn
Naspers invests R79 billion in new tech acquisitions

India:

Agarwal to split metals, oil biz from Vedanta
Dr Reddy's, Merck's Covid pill partner in India, sees a short-lived boom
Tata Motors' pact with private equity firm TPG 'credit positive': Moody's

Vietnam:

Homebase raises \$3 million in equity, debt
Agro-forestry-aquatic product exports rake in 38.75 billion USD
Reference exchange rate up 7 VND

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,337.69	-0.2%	0.6%	6.0%	65.3%	AED/USD	3.67	0.0%	0.0%
Egypt	11,453.30	0.4%	-1.0%	0.3%	5.6%	EGP/USD	15.72	0.1%	-0.1%
India	17,898.65	-0.6%	-1.1%	1.3%	28.0%	INR/USD	74.27	-0.1%	1.6%
Kenya	1,900.18	-0.6%	-1.0%	-3.1%	1.7%	KES/USD	112.00	0.0%	2.6%
Nigeria	1,766.30	-0.2%	-0.5%	1.1%	7.7%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,833.54	0.1%	-0.5%	1.1%	36.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,337.17	0.1%	1.7%	5.8%	18.3%	ZAR/USD	15.50	-0.3%	5.5%
Vietnam	1,519.58	0.2%	-0.5%	-0.8%	41.9%	VND/USD	22,653.00	0.0%	-1.9%

MSCI Emerging Markets

MSCI Frontier	677.31	-0.2%	-0.8%	-1.7%	18.5%	Brent Crude (\$)	80.28	-2.6%	55.0%
MSCI Frontier 100	1,564.77	-0.1%	-0.8%	-0.5%	24.4%	Gold (\$)	1,872.80	1.0%	-1.2%
MSCI Emerging	1,286.87	-0.3%	0.1%	1.7%	-0.3%	Copper (\$)	9,406.50	-1.6%	21.1%
MSCI World (USD)	3,221.03	-0.3%	-0.1%	1.5%	19.7%	Coffee (\$)	195.28	-0.3%	63.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.87	2.4%	26.1%	5.58	Unilever	13.50	-7.5%	-2.9%	17.55
Transnational Corporation	0.99	2.1%	10.0%	7.14	P Z Cussons	5.80	-4.1%	9.4%	2.18
Ecobank	8.45	1.8%	40.8%	7.31	Access	9.10	-2.7%	7.7%	87.28
United Capital PLC	9.80	1.6%	135.0%	22.47	Fidelity	2.60	-2.3%	3.2%	17.98
UBA	8.40	0.6%	-2.9%	62.28	Guaranty	26.30	-2.2%	-18.7%	644.04
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	11.00	11.00	0.0%	0.45	UBN	5.00	4.65	7.5%	9.58
Transcorp Hotels	5.38	5.38	0.0%	0.00	Cap	19.50	15.25	27.9%	1.76
Total	216.80	216.80	0.0%	4.62	Unilever	13.50	10.50	28.6%	17.55
Seplat Petroleum	721.20	721.20	0.0%	63.29	Sterling	1.51	1.13	33.6%	1.91
Presco	88.90	88.90	0.0%	11.42	Guaranty	26.30	18.00	46.1%	644.04

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Bank of Ras Al Khaimah	4.72	14.8%	21.0%	14.69	Easylease motorcycle rentals	33.22	-10.0%	88.8%	4.76
Umm Al Qaiwain General Investment Co	0.98	6.2%	8.6%	0.10	National Corp for Tourism and Hotels	2.45	-9.9%	35.4%	0.05
Fertiglobe	3.73	1.9%	24.3%	33.83	National Takaful Company	0.71	-9.8%	-28.9%	0.00
Response Plus Holding	11.80	1.7%	-5.6%	5.74	Eshraq Investments	0.42	-3.7%	31.4%	96.44
Bank of Sharjah PJSC	0.60	1.7%	-4.8%	0.61	Manazel PJSC	0.58	-3.3%	65.7%	25.28
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)
Insurance House	0.91	0.91	0.0%	0.00	National Bank of Fujairah	5.00	4.98	0.4%	0.00
Al Buhaira Ntl Ins.	1.82	1.82	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Ooredoo QPSC	7.00	6.59	6.2%	4.44
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Abu Dhabi National Energy	1.28	1.18	8.5%	10.01
The National Investor PRJSC	0.60	0.60	0.0%	0.00	Sudatel Telecom	0.35	0.32	8.8%	0.07

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Heliopolis Housing	4.23	3.7%	-30.7%	10.11	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.12	-5.8%	-44.2%	4.23
Egyptian Kuwaiti Holding-EGP	21.50	2.5%	21.1%	12.38	Aspire Capital Holding	0.26	-3.7%	-38.2%	1.44
Alexandria Mineral Oils Company	3.76	2.5%	20.5%	1.70	Raya Holding For Financial Investments	2.50	-2.3%	242.5%	0.83
Fawry For Banking Tech & Electronic Payment	12.90	2.4%	-50.6%	38.77	GB AUTO	3.70	-1.9%	11.4%	4.58
MM Group For Industry AndInternational Trade	6.01	2.0%	-23.3%	28.33	Credit Agricole Egypt	28.21	-1.4%	-2.8%	4.59
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£)
Telecom Egypt	14.45	14.45	0.0%	9.42	Aspire Capital Holding	0.26	0.26	0.0%	1.44
Sidi Kerir Petrochemicals	6.44	6.44	0.0%	11.45	Commercial International Bank	53.00	53.00	0.0%	69.04
Oriental Weavers	8.68	8.68	0.0%	8.33	Gadwa For Industrial Development	1.02	1.02	0.0%	0.68
MM Group For Industry AndInternational Trade	6.01	6.01	0.0%	28.33	GB AUTO	3.70	3.70	0.0%	4.58
Misr Fertilizers ProductionCompany - Mopco	93.60	93.60	0.0%	1.16	Ibnsina Pharma	3.43	3.43	0.0%	23.19

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Maruti Suzuki India	8240.00	2.4%	7.7%	19527.188	UPL	755.25	-3.2%	61.9%	2289.33
Asian Paints	3225.95	2.4%	16.7%	5203.28	Reliance Industries	2462.80	-2.2%	24.1%	11676.00
SBI Life Insurance	1180.05	2.4%	30.5%	3391.97	Cipla	902.50	-2.1%	10.1%	1813.65
Tata Motors	528.40	1.8%	187.4%	25753.94	Britannia Inds.	3615.30	-2.0%	1.1%	913.87
NTPC	136.55	1.7%	37.4%	2086.29	Axis Bank	712.00	-2.0%	14.8%	12973.79
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Maruti Suzuki India	8240.00	8350.00	-1.3%	19527.19	Hero Motocorp	2740.00	2636.00	3.9%	1567.67
Tata Motors	528.40	536.70	-1.5%	25753.94	Britannia Inds.	3615.30	3317.30	9.0%	913.87
Larsen & Toubro	1951.00	1981.75	-1.6%	4252.66	HUL	2390.00	2095.00	14.1%	2292.15
HDFC	2949.00	3021.10	-2.4%	7081.62	Hdfc Bank	1531.20	1342.00	14.1%	5833.89
Mahindra & Mahindra	949.45	979.00	-3.0%	5218.20	HDFC Life Insurance Company	708.95	617.40	14.8%	1760.98

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	8.50	3.2%	4.2%	0.28	Stanbic Holdings	90.50	-3.7%	6.5%	227.98
Nation Media Group	20.15	0.8%	30.4%	0.43	Bamburi Cement Limited	35.35	-3.2%	-6.6%	0.62
British American Tobacco Kenya Ltd	428.75	0.1%	18.8%	0.81	Centum Investment Company Plc	15.35	-1.3%	-4.4%	0.31
					East African Breweries Limited	158.50	-1.1%	2.8%	17.40
					WPP Scangroup Plc	4.38	-0.7%	-27.0%	0.07
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)
Equity Group Holdings Plc	51.50	55.00	-6.4%	126.28	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	11.63
Stanbic Holdings	90.50	99.00	-8.6%	227.98	Diamond Trust Bank Limited	57.25	55.25	3.6%	0.50
Absa Bank Kenya	10.35	11.35	-8.8%	10.74	East African Breweries Limited	158.50	148.00	7.1%	17.40
Total Kenya Ltd	24.50	27.50	-10.9%	0.01	Centum Investment Company Plc	15.35	14.05	9.3%	0.31
The Cooperative Bank of Kenya Ltd	12.45	14.05	-11.4%	0.57	The Cooperative Bank of Kenya Ltd	12.45	11.20	11.2%	0.57

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Fertilizer Co.	448.00	6.7%	455.8%	191.34	Naseej International Trading Co	33.70	-4.3%	-66.0%	24.51
Saudi Real Estate Co.	22.80	6.6%	50.8%	49.43	Maharah Human Resources Co.	80.00	-2.4%	6.0%	56.73
Saudi Real Estate Co.	22.80	6.6%	50.8%	49.43	Taiba Investments Co.	41.70	-2.3%	38.1%	131.57
SEDCO Capital REIT Fund	12.74	4.1%	36.3%	15.68	Middle East Specialized Cables Co.	18.66	-2.3%	21.0%	15.12
Jabal Omar Development Co.	30.70	4.1%	5.5%	34.02	Bawan Co.	35.80	-2.1%	44.1%	7.76
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)
The Saudi National Bank	69.60	69.60	0.0%	91.38	Tanmiah Food Co.	84.00	84.00	0.0%	5.85
Zamil Industrial Investment Co.	30.90	30.90	0.0%	15.12	BinDawood Holding Co.	101.00	101.00	0.0%	12.82
United International Transportation Co.	48.55	48.55	0.0%	15.13	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Electronics Co.	141.40	141.40	0.0%	8.39	Fawaz Abdulaziz Alhokair Co.	16.92	15.76	7.4%	11.29
United Cooperative Assurance Co.	35.50	35.50	0.0%	22.96	National Shipping Company of Saudi Arabia	34.90	31.70	10.1%	17.93

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Investec Plc	7556.00	2.4%	106.2%	5490.02	Spar Group	18194.00	-7.3%	-4.0%	28814.91
Investec Ltd (JSE)	7415.00	2.2%	96.9%	11131.84	Woolworths Hdg.	5380.00	-6.5%	36.1%	97350.73
Firstrand Ltd	5905.00	2.2%	15.7%	91879.14	Reinet Investments	26606.00	-4.2%	-3.5%	10809.22
Discovery Ltd	14504.00	1.9%	-5.5%	13530.69	Aspen Phmc.R.Hdg.	21309.00	-2.6%	70.0%	15413.95
Mondi (JSE)	38298.00	1.5%	11.6%	9437.24	Shoprite Limited	19608.00	-2.2%	40.1%	21541.45
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)
Investec Plc	7556.00	7600.00	-0.6%	5490.02	Reinet Investments	26606.00	25918.00	2.7%	10809.22
Investec Ltd	7415.00	7467.00	-0.7%	11131.84	Brit.Amer.Tobacco	53558.00	51051.00	4.9%	13228.93
Gold Fields	17333.00	17652.00	-1.8%	28806.58	Spar Group	18194.00	17342.00	4.9%	28814.91
Remgro Limited	13632.00	14187.00	-3.9%	9732.99	Sanlam Limited	5957.00	5439.00	9.5%	10101.16
Shoprite Limited	19608.00	20490.00	-4.3%	21541.45	Vodacom Group	13711.00	12024.00	14.0%	17104.50

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietnam National Petroleum Group	62100.00	5.6%	16.1%	286.525,58	Phu Nhuan Jewelry	106400.00	-1.5%	32.6%	49.240,88
Saigon Securities Inc	45850.00	2.5%	118.9%	912.634,01	Hoa Phat Group JSC	51400.00	-1.2%	68.3%	1.558.527,70
Bank for Inv. and Devp	43600.00	1.9%	-9.0%	105.902,64	Tien Phong Commercial Joint Stock Bank	43250.00	-1.0%	37.3%	68.296,09
Vietnam Rubber Group JSC	40000.00	1.7%	33.6%	133.248,27	Masan Group Corp	150500.00	-1.0%	70.7%	54.638,10
Vingroup JSC	96300.00	1.6%	-1.6%	269.901,90	BaoViet Holdings	64200.00	-0.6%	-2.7%	62.318,09
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietjet Aviation	127900.00	127900.00	0.0%	95.264,54	Military Commercial Bank	28700.00	28700.00	0.0%	197.720,08
Vingroup JSC	96300.00	96300.00	0.0%	269.901,90	Vietnam National Petroleum Group	62100.00	62100.00	0.0%	286.525,58
Techcombank	52200.00	52200.00	0.0%	629.570,97	Sai Gon Thuong Tin Commercial	28000.00	28000.00	0.0%	289.981,27
Saigon Securities Inc	45850.00	45850.00	0.0%	912.634,01	Tien Phong Commercial Joint Stock Bank	43250.00	43250.00	0.0%	68.296,09
Phu Nhuan Jewelry	106400.00	106400.00	0.0%	49.240,88	Vincom Retail	30450.00	30450.00	0.0%	203.932,44

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