

Daily Market Report

24 November 2021

JSE

JSE All-Share Index increased by 0.21% to close at 71,015.38 points on Tuesday, as Resources sector recorded gains.

BRVM

BRVM Composite Index closed at 193.31 points, up by 0.08% on Tuesday with Bollore Transport & Logistics and CFAO Motors Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index slipped by 0.01% to close at 43,255.14 points on Tuesday, as Insurance, Consumer goods and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index inched up by 0.09% to close at 11,369.22 points on Tuesday, as the market gained LE 5.2 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index decreased by 0.22% to close at 1000.03 points on Tuesday.

African Markets

Nigeria: NSE 30 Index inched up by 0.01% and closed at 1,759.02 points on Tuesday. Flour Mills and Access were the top gainers.

Egypt: EGX 30 Index inched up by 0.09% to close at 11,369.22 points on Tuesday, as the market gained LE 5.2 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index increased by 0.13% and closed at 1,878.46 points on Tuesday. WPP Scangroup and Absa Bank Kenya were the top gainers.

South Africa: JSE Top 40 Index increased by 0.28% to close at 64,566.39 points on Tuesday, as Resources sector recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.21%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.08%

NSE
Nigerian Stock Exchange ▼ 0.01%

EGX
Egyptian Stock Exchange ▲ 0.09%

ESG
Casablanca Stock Exchange ▼ 0.22%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.64
INTERBANK RATES	
OBB	15.00 ▼
Overnight	16.02 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased by 0.75% to close at 8,407.52 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index inched up by 0.04% to close at 444.24 points.

Vietnam: VN-30 Index rose by 1.06% to close at 1,533.12 points on Tuesday, as the blue-chip companies recorded gains. MSCI Vietnam advanced by 1.40% to close at 1,057.07 points.

Saudi Arabia: Tadawul All Share Index rose by 0.76% to close at 11,256.52 points on Tuesday, as gains in the Industrial Investment, Hotels & Tourism and Media & Publishing sectors led shares higher. MSCI Saudi Arabia increased by 0.59% to close 1,560.56 points.

India: Nifty 50 market increased 0.50% to close at 17,503.35 points on Tuesday, as gains in the Metals, Power and Real Estate sectors led shares higher. MSCI India rose by 0.71% to close at 2051.32 points.

News

Nigeria:

CBN retains lending rate at 11.5%
SEC approves MTN offer for sale of 575 million shares
FG to Replace Fuel Subsidy with Monthly N5,000 Transport Grant

Kenya:

Forex reserves fall Sh21.8bn on foreign debt payments
Public wage bill to drop 12pc ahead of IMF-backed reforms
KMRC talks set the stage for mortgage-backed securities

Abu Dhabi:

Abu Dhabi ADQ, Alpha Dhabi to invest \$375mln in OCI's methanol unit
UAE's biggest lender FAB to open first branch in China
Masdar looks to invest in renewables and desalination in Israel

Saudi Arabia:

OPEC+ may adjust oil production plans next week in wake of US move
Amiantit's board proposes capital cut, capital raise through rights issue
Investcorp's new Saudi investment vehicle aims to raise \$500mln

Egypt:

AIIB approves \$360M in devp. financing for Egypt to support inclusive growth
Egypt to offer 5-6 companies on EGX before end of 2021/2022
Trade exchange between Egypt, Bahrain up to \$370m in 1st half of 2021

South Africa:

SA miners plan R60bn spend on power projects
PPC reports revenue up by 20%
Netcare Group resumes dividend as it pares down debt

India:

India agrees with US, to release oil from stockpile to cool prices
Govt lists bill in winter session to ban all private cryptocurrency
Star Union Dai-ichi Life raises Rs 125cr via bonds

Vietnam:

Vietnam - US trade likely to reach 100 billion USD this year
Vietnam seeks to beef up trade, investment ties with Australia
Vietnam seeks stronger cooperation with Belgium's Antwerp province

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,407.52	0.8%	0.7%	6.9%	66.6%	AED/USD	3.67	0.0%	0.0%
Egypt	11,369.22	0.1%	0.3%	-0.4%	4.8%	EGP/USD	15.72	0.0%	-0.1%
India	17,503.35	0.5%	-1.5%	-1.0%	25.2%	INR/USD	74.42	0.0%	1.9%
Kenya	1,878.46	0.1%	-0.8%	-4.2%	0.5%	KES/USD	112.35	0.0%	2.9%
Nigeria	1,759.02	0.01%	0.2%	0.7%	7.3%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,256.52	0.8%	-3.9%	-3.8%	29.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,566.39	0.3%	1.1%	6.2%	18.7%	ZAR/USD	15.87	0.7%	8.0%
Vietnam	1,533.12	1.1%	2.2%	0.1%	43.2%	VND/USD	22,680.00	0.0%	-1.7%

MSCI Emerging Markets

MSCI Frontier	666.18	0.2%	-0.4%	-3.3%	16.5%	Brent Crude (\$)	82.31	3.3%	58.9%
MSCI Frontier 100	1,540.00	0.1%	-0.8%	-2.1%	22.4%	Gold (\$)	1,786.30	-1.3%	-5.7%
MSCI Emerging	1,255.39	-0.5%	-1.1%	-0.7%	-2.8%	Copper (\$)	9,710.50	-0.2%	25.0%
MSCI World (USD)	3,196.88	-0.1%	-0.7%	0.7%	18.8%	Coffee (\$)	199.86	-0.3%	67.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.83	2.5%	20.3%	1.80	Axamansard	2.23	-5.1%	112.4%	1.77
Flour Mills	29.75	1.7%	14.4%	240.62	Fidelity	2.50	-3.8%	-0.8%	11.27
Access	9.25	1.6%	9.5%	121.51	International Breweries	5.35	-2.7%	-10.1%	15.73
Unilever	13.70	1.5%	-1.4%	43.59	Dangote Sugar	16.30	-1.2%	-7.4%	18.22
Transnational Corporation	0.97	1.0%	7.8%	5.76	UBA	8.15	-0.6%	-5.8%	23.63
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	10.45	10.45	0.0%	17.19	UBN	4.95	4.65	6.5%	6.64
Transcorp Hotels	5.38	5.38	0.0%	0.00	Cap	19.50	15.25	27.9%	3.26
Total	216.80	216.80	0.0%	4.07	Unilever	13.70	10.50	30.5%	43.59
Seplat Petroleum	721.20	721.20	0.0%	17.19	Sterling	1.48	1.13	31.0%	3.13
P Z Cussons	6.10	6.10	0.0%	1.42	Guaranty	25.40	18.00	41.1%	919.63

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ARAM GROUP	3.10	10.7%	3.3%	0.35	Gulf Medical Projects	1.62	-10.0%	-32.5%	5.31
Sharjah Cement	0.72	9.1%	-5.3%	0.30	Sharjah Insurance	1.16	-9.4%	-45.0%	0.00
National Corp for Tourism and Hotels	3.40	6.3%	87.8%	0.05	Zee Store	25.70	-8.5%	144.8%	9.55
RAK Co. for White Cement & Construction	1.70	3.0%	100.2%	0.16	Response Plus Holding	10.60	-4.3%	-15.2%	4.33
Eshraq Investments	0.42	2.9%	33.0%	12.36	Al Seer Marine Supplies & Equipment Co	14.20	-3.4%	-5.3%	24.82
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	Sawaed Holding PJSC	7.05	7.05	0.0%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	National Bank of Fujairah	5.00	4.98	0.4%	0.00
Sawaed Holding PJSC	7.05	7.05	0.0%	0.00	Al Buhaira Ntl Ins.	1.64	1.63	0.6%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Abu Dhabi National Energy	1.19	1.18	0.8%	4.22
Umm Al Qaiwain General Inv.	1.00	1.00	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Palm Hills Development	1.79	5.2%	31.1%	9.85	Abou Kir Fertilizers	19.16	-1.1%	-7.4%	8.22
Raya Holding For Financial Investments	2.51	3.7%	243.8%	0.35	Eastern Company	11.91	-0.8%	-8.7%	29.64
Pioneers Properties For UrbanDevelopment(PREDCO)	2.41	2.6%	-26.3%	2.40	Commercial International Bank	52.20	-0.6%	-11.8%	156.18
T M G Holding	7.68	2.5%	16.9%	18.39	MM Group For Industry And International Trade	5.77	-0.4%	-26.4%	5.56
Alexandria Mineral Oils Company	3.74	2.5%	19.9%	1.80	Fawry For Banking TechnologyAnd Electronic Payment	12.40	-0.2%	-52.5%	39.97
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	14.52	14.52	0.0%	8.24	Aspire Capital Holding	0.26	0.26	0.0%	0.98
Sidi Kerir Petrochemicals	6.68	6.68	0.0%	7.12	Commercial International Bank	52.20	52.20	0.0%	156.18
Oriental Weavers	8.44	8.44	0.0%	2.19	Gadwa For Industrial Development	1.01	1.01	0.0%	1.69
MM Group For Industry AndInternational Trade	5.77	5.77	0.0%	5.56	GB AUTO	3.69	3.69	0.0%	5.00
Misr Fertilizers ProductionCompany - Mopco	92.80	92.80	0.0%	2.87	Ibnsina Pharma	3.41	3.41	0.0%	4.93

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Power Grid Corp Of India	202.00	4.0%	6.4%	2939.370	Asian Paints	3176.50	-2.6%	14.9%	4769.15
Jsw Steel	683.25	4.0%	76.5%	6156.63	Indusind Bank	981.00	-2.6%	9.6%	8023.50
Coal India	156.50	4.0%	15.5%	2053.77	Infosys	1727.50	-1.8%	37.6%	14616.83
NTPC	133.55	2.6%	34.4%	1516.33	Axis Bank	684.00	-0.4%	10.2%	11403.01
Adani Ports And Sez.	730.95	2.2%	51.1%	2535.11	Titan Company	2385.00	-0.3%	52.2%	2991.20
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Power Grid Corp Of India	202.00	209.95	-3.8%	2939.37	Hero Motocorp	2633.00	2600.00	1.3%	1647.04
HDFC	2900.00	3021.10	-4.0%	9671.80	Britannia Inds.	3660.00	3317.30	10.3%	1329.56
Larsen & Toubro	1893.05	1981.75	-4.5%	3803.26	Bharat Petroleum	397.70	357.00	11.4%	1346.28
Tech Mahindra	1557.00	1630.00	-4.5%	2821.59	Dr Reddys Lab	4626.00	4135.00	11.9%	982.59
Grasim Industries	1776.80	1893.00	-6.1%	2620.38	HDFC Life Insurance Company	694.45	617.40	12.5%	1442.32

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	4.25	3.4%	-29.2%	1.22	Kengen Limited	4.34	-3.1%	-7.9%	0.56
Absa Bank Kenya	10.75	2.9%	11.3%	13.63	Safaricom Plc	37.55	-1.1%	9.6%	232.44
Nation Media Group	19.50	1.8%	26.2%	0.37	The Cooperative Bank of Kenya Ltd	12.35	-0.8%	-1.2%	1.34
Kenya Power & Lighting Limited	1.75	1.2%	2.3%	0.63	KCB Group Plc	44.70	-0.6%	17.3%	124.90
Centum Investment Company Plc	15.10	0.7%	-5.9%	0.31	Equity Group Holdings Plc	51.75	-0.5%	41.6%	2.85
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	10.75	11.35	-5.3%	13.63	Standard Chartered Bank Kenya Ltd	128.50	127.00	1.2%	2.42
Equity Group Holdings Plc	51.75	55.00	-5.9%	2.85	Diamond Trust Bank Limited	57.00	55.25	3.2%	0.67
Stanbic Holdings	91.75	99.00	-7.3%	0.00	East African Breweries Limited	157.50	148.00	6.4%	1.62
Total Kenya Ltd	24.40	27.50	-11.3%	0.58	Centum Investment Company Plc	15.10	14.05	7.5%	0.31
KCB Group Plc	44.70	50.75	-11.9%	124.90	Nairobi Securities Exchange Plc	8.24	7.50	9.9%	0.04

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Amiantit Co.	17.02	6.6%	-21.9%	20.19	Taiba Investments Co.	34.85	-5.6%	15.4%	83.37
Filing and Packing Materials Manufacturing Co.	53.00	6.0%	-11.5%	62.88	National Metal Manufacturing and Casting Co.	28.15	-2.9%	-16.2%	21.97
Abdullah Al Othaim Markets Co.	115.00	5.3%	-6.4%	10.67	Saudi British Bank	30.80	-2.4%	24.6%	26.09
Bawan Co.	35.05	4.9%	41.1%	6.06	Saudi Chemical Co.	34.05	-2.0%	-2.6%	9.04
Saudi Arabian Mining Co.	77.40	4.5%	91.1%	98.09	Makkah Construction and Development Co.	74.00	-1.3%	15.6%	16.67
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	65.10	65.10	0.0%	238.07	Savola Group	33.40	33.40	0.0%	30.37
Zamil Industrial Investment Co.	27.80	27.80	0.0%	41.16	Tanmiah Food Co.	78.50	78.50	0.0%	7.76
United Electronics Co.	135.00	135.00	0.0%	29.05	BinDawood Holding Co.	99.90	99.90	0.0%	6.35
United Cooperative Assurance Co.	34.75	34.75	0.0%	2.76	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Taiba Investments Co.	34.85	34.85	0.0%	83.37	Nayifat Finance Co.	35.45	33.75	5.0%	360.55

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Limited	26592.00	6.9%	98.6%	73793.39	Impala Platinum	19847.00	-3.5%	-1.7%	66314.54
BHP Group	42275.00	3.4%	8.7%	55956.54	Naspers Ltd	256624.00	-3.3%	-15.0%	220951.21
MTN Group	16262.00	3.3%	170.2%	43551.69	Redefine Properties	495.00	-2.8%	48.6%	4850.69
Investec Ltd	8304.00	2.1%	120.6%	13250.69	Anglo American Platinum	165112.00	-1.8%	21.4%	28239.11
RMB Holdings Ltd	144.00	2.1%	73.2%	449.01	Old Mutual Limited	1393.00	-1.6%	36.9%	18595.67
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 Ltd	8304.00	8312.00	-0.1%	13250.69	Reinet Investments	26283.00	25918.00	1.4%	12753.12
Investec Plc	8236.00	8323.00	-1.0%	10601.38	Spar Group	17177.00	16880.00	1.8%	18422.26
Gold Fields	17393.00	17652.00	-1.5%	70276.69	Sanlam Limited	5844.00	5439.00	7.4%	20283.77
Shoprite Limited	19695.00	20490.00	-3.9%	15986.73	Brit.Amer.Tobacco	54890.00	51051.00	7.5%	40274.55
Capitec Bank	182254.00	193695.00	-5.9%	25391.99	Naspers Ltd	256624.00	229087.00	12.0%	220951.21

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	52000.00	7.0%	148.2%	1856293.76	Bank for Inv. and Devp	44700.00	-1.9%	-6.7%	80299.92
Khang Dien House Trading & Investment	45500.00	5.8%	70.8%	56600.77	Ho Chi Minh City Devp	31800.00	-1.6%	33.9%	187642.05
PetroVietnam Power Corp	13800.00	5.8%	1.5%	207673.18	Vietnam Prosperity	36250.00	-1.2%	-71.0%	274.433.83
Vietnam Rubber Group JSC	37500.00	5.3%	25.2%	89.255.11	Vietnam JSC Bank	34100.00	-1.2%	27.4%	336381.60
Tien Phong Commercial Joint Stock Bank	48700.00	4.7%	54.6%	371683.98	Sai Gon Thuong Tin Commercial	28500.00	-1.0%	-12.2%	306.538.82
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietjet Aviation	132000.00	132000.00	0.0%	169704.42	Military Commercial Bank	28900.00	28900.00	0.0%	286698.78
Vingroup JSC	94800.00	94800.00	0.0%	130382.10	Vietnam National Petroleum Group	57000.00	57000.00	0.0%	141193.10
Techcombank	52600.00	52600.00	0.0%	559089.56	Sai Gon Thuong Tin Commercial	28500.00	28500.00	0.0%	306.538.82
Saigon Securities Inc	52000.00	52000.00	0.0%	1856293.76	Tien Phong Commercial Joint Stock Bank	48700.00	48700.00	0.0%	371683.98
Phu Nhuan Jewelry	105700.00	105700.00	0.0%	50990.29	Vincom Retail	30150.00	30150.00	0.0%	216.788.52

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