

Daily Market Report

25 November 2021

JSE

JSE All-Share Index decreased by 0.64% to close at 70,558.88 points on Wednesday, as Industrial and Financial sectors recorded losses.

BRVM

BRVM Composite Index closed at 193.00 points, down by 0.16% on Wednesday with Sicom Côte d'Ivoire and Solibra Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index slipped by 0.02% to close at 43,245.02 points on Wednesday, as Oil & Gas sector recorded losses.

EGX

EGX 30 Index decreased by 0.15% to close at 11,352.64 points on Wednesday, as the market lost LE 1.1 billion of market cap, amid Egyptian selling.

ESG

Casablanca ESG 10 Index increased by 0.18% to close at 1,001.83 points on Wednesday.

African Markets

Nigeria: NSE 30 Index inched down by 0.02% and closed at 1,758.68 points on Wednesday. Stanbic IBTC and FBNH were the top losers.

Egypt: EGX 30 Index decreased by 0.15% to close at 11,352.64 points on Wednesday, as the market lost LE 1.1 billion of market cap, amid Egyptian selling.

Kenya: NSE 20 Index decreased by 0.61% and closed at 1,866.97 points on Wednesday. Diamond Trust Bank and NCBA Group were the top losers.

South Africa: JSE Top 40 Index decreased by 0.62% to close at 64,169.17 points on Wednesday, as Industrial and Financial sectors recorded losses.

Capital Markets

JSE
Johannesburg Stock Exchange ▼ 0.64%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.16%

NSE
Nigerian Stock Exchange ▼ 0.02%

EGX
Egyptian Stock Exchange ▼ 0.15%

ESG
Casablanca Stock Exchange ▲ 0.18%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.63
INTERBANK RATES	
OBB	8.67 ▼
Overnight	9.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased by 0.11% to close at 8,398.31 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index slipped by 0.04% to close at 444.06 points.

Vietnam: VN-30 Index surged by 2.10% to close at 1,565.29 points on Wednesday, as the blue-chip companies recorded gains. MSCI Vietnam rose by 0.94% to close at 1066.96 points.

Saudi Arabia: Tadawul All Share Index advanced by 1.00% to close at 11,369.38 points on Wednesday, as gains in the Industrial Investment, Insurance and Retail sectors led shares higher. MSCI Saudi Arabia rose 0.93% to close 1,575.15 points.

India: Nifty 50 market decreased 0.50% to close at 17,415.05 points on Wednesday, as losses in the IT, Auto and Technology sectors led shares lower. MSCI India declined by 0.62% to close at 2038.50 points.

News

Nigeria:

With 49% foreign ownership, Nigeria Air starts operations April 2022
Oil sector GDP contribution drops by N270bn in nine months
Sovereign Trust Insurance Grows Profit by 17% in Q3

Kenya:

NCBA to open 4 new branches as profit doubles to Sh6.5bn
Kenya's trade deficit up 38pc to Sh988bn
Shilling weakens further on rising dollar demand

Abu Dhabi:

UAE announces \$10 billion fund for investments in Turkey
Emirates Development Bank lends \$191m to UAE's industrial sector
Dubai's Shuaa Capital confirms plans to IPO portfolio companies

Saudi Arabia:

Saudi's SAMA greenlights merger of insurers Amana Cooperative, Enaya
Saudi Arabia's non-oil exports rise 28% to \$18bn in Q3 2021
Saudi economy to grow by 4.9% in 2022 on higher oil output: KPMG

Egypt:

Arab Fund for Social & Economic Devp to finance Egyptian SMEs with \$30M
Egypt aims to increase tax revenues by 2% of GDP in 4 years
UAE's Fertiglabe leads new green hydrogen project in Egypt

South Africa:

SA's Q4 business confidence flat
Prosus turns spending focus on fast-growing online car dealers
Sanral's R7bn 'Brics bank' loan stopped by National Treasury

India:

RIL to hive off gasifier biz to 100% arm Govt of India, Asian Development Bank sign \$300 mn loan
Star Health's IPO to open on Nov 30, looks to raise Rs 7,000cr

Vietnam:

Vietnam's industry-trade ministry, Japanese prefecture seal cooperation deal
Việt Nam, Russia boost agricultural, aquatic trade ties
Đà Nẵng IT Park to receive US\$100 million of investment

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,398.31	-0.1%	0.6%	6.8%	66.5%	AED/USD	3.67	0.0%	0.0%
Egypt	11,352.64	-0.1%	0.1%	-0.6%	4.7%	EGP/USD	15.72	0.0%	-0.1%
India	17,415.05	-0.5%	-2.0%	-1.5%	24.6%	INR/USD	74.40	0.0%	1.8%
Kenya	1,866.97	-0.6%	-1.4%	-4.8%	-0.1%	KES/USD	112.40	0.0%	2.9%
Nigeria	1,758.68	-0.02%	0.2%	0.7%	7.2%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,369.38	1.0%	-2.9%	-2.9%	30.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,169.17	-0.6%	0.5%	5.5%	18.0%	ZAR/USD	15.91	0.3%	8.3%
Vietnam	1,565.29	2.1%	4.3%	2.1%	46.2%	VND/USD	22,690.00	0.0%	-1.7%

MSCI Emerging Markets

MSCI Frontier	668.32	0.3%	-0.1%	-3.0%	16.9%	Brent Crude (\$)	82.25	-0.1%	58.8%
MSCI Frontier 100	1,542.28	0.1%	-0.6%	-2.0%	22.6%	Gold (\$)	1,786.90	0.03%	-5.7%
MSCI Emerging	1,253.15	-0.2%	-1.3%	-0.9%	-3.0%	Copper (\$)	9,835.00	1.3%	26.6%
MSCI World (USD)	3,198.12	0.0%	-0.7%	0.7%	18.9%	Coffee (\$)	206.99	3.6%	73.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	25.00	2.2%	18.8%	41.78	Wema	0.80	-3.6%	15.9%	0.97
Fidelity	2.55	2.0%	1.2%	9.67	Stanbic IBTC	37.75	-3.2%	-14.3%	39.35
Unilever	13.90	1.5%	0.0%	12.98	FBNH	12.00	-2.4%	67.8%	56.38
Zenith	24.45	1.0%	-1.4%	908.42	International Breweries	5.25	-1.9%	-11.8%	75.15
Transnational Corporation	0.98	1.0%	8.9%	5.52	United Capital PLC	9.65	-1.5%	131.4%	31.45
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%	0.33	UBN	4.95	4.65	6.5%	14.30
Transcorp Hotels	5.38	5.38	0.0%	0.00	Cap	19.50	15.25	27.9%	2.68
Total	216.80	216.80	0.0%	33.04	Sterling	1.49	1.13	31.9%	33.70
Seplat Petroleum	721.20	721.20	0.0%	1.00	Unilever	13.90	10.50	32.4%	12.98
P Z Cussons	6.10	6.10	0.0%	1.94	Guaranty	25.40	18.00	41.1%	344.89

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ZEE STORE PRJSC	27.26	6.1%	159.6%	20.65	Al Buhaira Ntl Ins.	1.48	-9.8%	-13.5%	0.51
Gulf Medical Projects	1.70	4.9%	-29.2%	0.02	Sharjah Insurance	1.05	-9.5%	-50.2%	0.00
Abu Dhabi Islamic Bank	6.34	2.8%	34.9%	21.47	Abu Dhabi National Hotels	3.30	-3.8%	17.9%	1.47
Arkan Building Materials	1.54	2.0%	75.0%	7.03	RAK Co. for White Cement & Construction	1.65	-2.9%	94.3%	0.08
Methaq Takaful Ins.	0.80	1.7%	-7.9%	0.29	Response Plus Holding	10.30	-2.8%	-17.6%	4.65
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Insurance House	0.91	0.91	0.0%	0.00	Sawaeed 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
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Abu Dhabi National Energy	1.20	1.18	1.7%	1.08
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00
Umm Al Qaiwain General Inv.	1.00	1.00	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.02

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian Financial Group-HermesHolding Company	13.87	6.7%	13.8%	102.36	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.11	-4.1%	-27.9%	1.07
GB AUTO	3.85	4.3%	16.0%	2.99	Fawry For Banking Technology And Electronic Payment	12.09	-2.5%	-13.9%	24.56
Gadwa For Industrial Development	1.03	2.3%	0.0%	1.75	Credit Agricole	28.63	-1.4%	-1.3%	2.52
ELSWEDY ELECTRIC	8.36	1.7%	-14.8%	11.54	Pioneers Properties For Urban Devp	2.38	-1.2%	0.0%	1.16
Ibsina Pharma	3.46	1.5%	-32.0%	2.82	Egyptian for Tourism Resorts	1.27	-1.1%	-9.9%	2.04
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£)
Egyptian Financial Group-HermesHolding Company	13.87	13.90	-0.2%	102.36	Fawry For Banking TechnologyAnd Electronic Payment	12.09	12.03	0.5%	24.56
T M G Holding	7.66	7.99	-4.1%	10.45	MM Group For Industry And International Trade	5.81	5.71	1.8%	9.40
Commercial International Bank(Egypt)	51.87	54.15	-4.2%	77.82	Citadel Capital - Common Shares	1.15	1.09	5.4%	1.59
Telecom Egypt	14.50	15.35	-5.5%	3.78	Sidi Kerir Petrochemicals	6.68	6.33	5.5%	5.11
Credit Agricole Egypt	28.63	30.45	-6.0%	2.52	Heliopolis Housing	4.20	3.97	5.8%	4.74

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ONGC	152.95	4.3%	64.4%	5568.630	Eicher Motors	2526.05	-2.8%	-0.2%	1170.87
Adani Ports And Sez.	758.00	3.9%	56.7%	8864.80	Tata Consumer products Ltd.	798.00	-2.8%	35.3%	1323.78
Coal India	158.85	1.7%	17.3%	2988.05	Maruti Suzuki India	7636.60	-2.8%	-0.2%	4407.28
NTPC	135.20	1.3%	36.1%	1027.28	Grasim Industries	1734.10	-2.8%	86.9%	1229.87
Kotak Mahindra Bank	2006.55	1.2%	0.5%	3898.00	Infosys	1690.20	-2.7%	34.6%	12560.58
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	202.85	209.95	-3.4%	2783.17	Hero Motocorp	2614.90	2600.00	0.6%	1486.01
HDFC	2870.50	3021.10	-5.0%	6730.62	Britannia Inds.	3611.00	3317.30	8.9%	543.19
Tech Mahindra	1534.00	1630.00	-5.9%	2535.71	Eicher Motors	2526.05	2303.70	9.7%	1170.87
Larsen & Toubro	1854.00	1981.75	-6.4%	2562.47	HDFC Life Insurance Company	685.35	617.40	11.0%	1458.07
Nestle India Limited	19050.00	20609.15	-7.6%	658.57	Dr Reddys Lab	4600.00	4135.00	11.2%	920.29

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	4.43	2.1%	-5.9%	0.53	Diamond Trust Bank Limited	55.75	-2.2%	-25.7%	0.26
Absa Bank Kenya	10.90	1.4%	12.8%	46.01	NCBA Group Plc	23.10	-1.9%	-13.6%	77.67
Nairobi Securities Exchange Plc	8.30	0.7%	1.7%	0.08	Safaricom Plc	36.95	-1.6%	7.9%	555.76
Total Kenya Ltd	24.45	0.2%	1.9%	0.01	East African Breweries Limited	155.00	-1.6%	0.5%	50.61
Kenya Reinsurance Corporation Ltd	2.26	0.0%	-2.6%	0.17	KCB Group Plc	44.00	-1.6%	15.5%	182.65
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	10.90	11.35	-4.0%	46.01	Standard Chartered Bank Kenya Ltd	128.00	127.00	0.8%	7.80
Equity Group Holdings Plc	51.50	55.00	-6.4%	11.99	Diamond Trust Bank Limited	55.75	55.00	1.4%	0.26
Stanbic Holdings	91.75	99.00	-7.3%	0.00	East African Breweries Limited	155.00	148.00	4.7%	50.61
Total Kenya Ltd	24.45	27.50	-11.1%	0.01	Centum Investment Company Plc	14.90	14.05	6.0%	4.43
The Cooperative Bank of Kenya Ltd	12.30	14.05	-12.5%	13.16	NCBA Group Plc	23.10	21.10	9.5%	77.67

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Enaya Cooperative Insurance Co.	27.60	10.0%	-20.0%	21.02	Development Works Food Co.	196.60	-7.1%	24.8%	183.92
Amana Cooperative Insurance Co.	30.90	10.0%	-16.8%	30.83	Saudi Arabian Fertilizer Co.	416.00	-3.3%	416.1%	64.71
Allied Cooperative Insurance Group	35.40	9.9%	-43.6%	28.12	CHUBB Arabia Cooperative Insurance Co.	35.05	-2.6%	8.0%	11.82
Saudi Industrial Export Co.	80.30	9.6%	-28.0%	21.37	Abdullah Al Othaim Markets Co.	112.60	-2.1%	-8.3%	6.50
Alinma Tokio Marine Co.	27.00	7.8%	10.7%	24.67	Herfy Food Services	67.50	-2.0%	13.3%	10.33
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	65.20	65.20	0.0%	118.27	Tanmiah Food Co.	79.00	79.00	0.0%	7.74
Zamil Industrial Investment	28.00	28.00	0.0%	29.33	BinDawood Holding	99.50	99.50	0.0%	2.90
United Electronics Co.	135.00	135.00	0.0%	6.26	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Cooperative Assurance Co.	34.85	34.85	0.0%	19.85	Nayifat Finance Co.	34.80	33.75	3.1%	229.27
Taiba Investments Co.	34.65	34.65	0.0%	29.88	National Shipping Company of Saudi Arabia	33.50	31.70	5.7%	13.46

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
BHP Group PLC	43300.00	2.4%	11.3%	46680.99	Old Mutual Ltd	1320.00	-5.2%	29.7%	23283.81
Glencore PLC	8017.00	1.0%	72.7%	27491.65	Aspen Pharmacare Holdings Ltd	21639.00	-3.1%	72.6%	17901.10
Sasol Ltd	26711.00	0.4%	99.4%	31611.35	Discovery Ltd	13796.00	-2.9%	-10.1%	18490.38
Cie Financiere Richemont SA	23645.00	0.3%	80.4%	37924.33	Woolworths Holdings Ltd/South Africa	5192.00	-2.9%	31.3%	11040.26
Anglo American Platinum Ltd	165195.00	0.1%	21.5%	23903.55	Absa Group Ltd	13410.00	-2.6%	11.9%	25288.03
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)
Glencore PLC	8017.00	8069.00	-0.6%	27491.65	SPAR Group Ltd/The	16763.00	16701.00	0.4%	12983.31
Cie Financiere Richemont SA	23645.00	24000.00	-1.5%	37924.33	Reinet Investments SCA	26021.00	25915.00	0.4%	9470.89
Investec PLC	8243.00	8377.00	-1.6%	8717.59	Sanlam Ltd	5732.00	5439.00	5.4%	20765.54
Investec Ltd	8186.00	8323.00	-1.6%	6442.96	British American Tobacco PLC	54819.00	51051.00	7.4%	18744.43
Gold Fields Ltd	17149.00	17652.00	-2.8%	51466.86	Naspers Ltd	252700.00	229087.00	10.3%	113793.08

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Military Commercial Bank	30900.00	6.9%	83.0%	1,293.787.40	Hoa Phat Group JSC	48650.00	-1.8%	59.3%	1328467.62
Sai Gon Thuong Tin Commercial	30450.00	6.8%	-6.2%	2,007.593.43	Petrovietnam Gas	103000.00	-1.5%	22.7%	96.730.86
Vietcombank	104800.00	5.8%	425.3%	192.652.02	PetroVietnam Power Corp	13600.00	-1.5%	0.0%	191.427.05
Techcombank	55500.00	5.5%	228.4%	2,832.804.30	Vietnam Rubber Group JSC	37200.00	-0.8%	24.2%	108.027.19
Ho Chi Minh City Devp	33500.00	5.4%	41.1%	392430.03	Vingroup JSC	94100.00	-0.7%	-3.9%	192.437.00
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	132200.00	132200.00	0.0%	155.803.90	Hoa Phat Group JSC	48650.00	48650.00	0.0%	1328467.62
Vingroup JSC	94100.00	94100.00	0.0%	192.437.00	Military Commercial Bank	30900.00	30900.00	0.0%	1,293.787.40
Techcombank	55500.00	55500.00	0.0%	2,832.804.30	Vietnam National Petroleum Group	57000.00	57000.00	0.0%	130564.77
Saigon Securities Inc	53200.00	53200.00	0.0%	1249214.92	Sai Gon Thuong Tin Commercial	30450.00	30450.00	0.0%	2,007.593.43
Phu Nhuan Jewelry	105700.00	105700.00	0.0%	31300.48	Tien Phong Commercial Joint Stock Bank	49100.00	49100.00	0.0%	358366.80

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