

# Daily Market Report

## 26 November 2021

### JSE

JSE All-Share Index slipped by 0.01% to close at 70,554.69 points on Thursday, as Resources sector recorded losses.

### BRVM

BRVM Composite Index closed at 194.08 points, up by 0.56% on Thursday with Ecobank Côte d'Ivoire and Bank of Africa - Burkina Faso being the top gainers.

### NSE

NSE All-Share Index decreased by 0.32% to close at 43,108.77 points on Thursday, as Oil & Gas, Banking, Consumer goods and Industrial sectors recorded losses.

### EGX

EGX 30 Index increased 0.69% to close at 11,431.24 points on Thursday, as the market gained LE 7.7 billion of market cap, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index decreased by 0.16% to close at 1,000.24 points on Thursday.

### African Markets

**Nigeria:** NSE 30 Index decreased by 0.44% and closed at 1,750.87 points on Thursday. Ecobank and Nigerian Breweries were the top losers.

**Egypt:** EGX 30 Index increased 0.69% to close at 11,431.24 points on Thursday, as the market gained LE 7.7 billion of market cap, amid Arab and foreign buying.

**Kenya:** NSE 20 Index increased by 0.27% and closed at 1,871.93 points on Thursday. Stanbic Holdings and Kenya Reinsurance Corporation were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.17% to close at 64,062.74 points on Thursday, as Resources sector recorded losses.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.01%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.56%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.32%
<b>EGX</b> Egyptian Stock Exchange	▲ 0.69%
<b>ESG</b> Casablanca Stock Exchange	▼ 0.16%

### Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.64
<b>INTERBANK RATES</b>	
OBB	2.33 ▼
Overnight	3.00 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.66% to close at 8,453.96 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index rose 0.80% to close at 447.61 points.

**Vietnam:** VN-30 Index increased by 0.46% to close at 1,572.46 points on Thursday, as the blue-chip companies recorded gains. MSCI Vietnam rose by 0.58% to close at 1,073.19 points.

**Saudi Arabia:** Tadawul All Share Index declined by 0.62% to close at 11,299.45 points on Thursday, as losses in the Cement, Petrochemicals and Telecoms & IT sectors pushed shares lower. MSCI Saudi Arabia fell 0.91% to close 1,560.84 points.

**India:** Nifty 50 market increased 0.70% to close at 17,536.25 points on Thursday, as gains in the Real Estate, Healthcare and Oil & Gas sectors led shares higher. MSCI India rose by 0.76% to close at 2053.97 points.

### News

#### Nigeria:

Infrastructure, Education Top Sanwo-Olu's N1.39trn 2022 Budget for Lagos  
Nigeria Air: FG to float IPO, begins operations with three planes  
NDIC pays 535,815 closed banks' depositors N11.76bn

#### Kenya:

Co-op gets Sh6.3bn EU bank loan for SMEs lending  
CMA bars ailing companies from share buybacks  
Kenya in the final stages of implementing AfCFTA

#### Abu Dhabi:

ADQ teams up with Turkish investment entities to boost priority sectors  
Emirates secures new codeshare deal to expand Baltic network  
UAE banks waive debt worth Dh1b

#### Saudi Arabia:

Saudi Arabia applies spending cap despite oil revenues  
Saudi Arabia preparing for 160 privatization deals in 2022  
Saudi Mobily plans 8.5% cash dividend for 2021

#### Egypt:

Egypt, Greece sign MoU to foster natural gas cooperation  
CAPMAS: Transformative, extractive industries index rises 2.2% in Sept.  
Coca Cola Hellenic to invest \$1bln in the Egyptian market over five years

#### South Africa:

JSE ready for secondary and fast-track listings from Singapore  
Accelerate Property Fund lifts distributable income in the six months to Sept 30  
Reit Arrowhead Properties lifts final dividend & reduced gearing further

#### India:

HDFC to raise up to Rs 10,000 crore next week  
IOC pays Rs 2,424 crore as dividend tranche to govt  
IL&FS sells tech arm to Falcon, cuts Rs 1,275cr debt

#### Vietnam:

Vietnam, Argentina boost trade cooperation  
VCSC signs \$100m syndicated loan facility  
Fintech start-up GIMO secures US\$1.9 million in funding

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,453.96	0.7%	1.3%	7.5%	67.6%	AED/USD	3.67	0.0%	0.0%
Egypt	11,431.24	0.7%	0.8%	0.1%	5.4%	EGP/USD	15.72	0.0%	-0.1%
India	17,536.25	0.7%	-1.3%	-0.8%	25.4%	INR/USD	74.51	0.1%	2.0%
Kenya	1,871.93	0.3%	-1.1%	-4.6%	0.2%	KES/USD	112.40	0.0%	2.9%
Nigeria	1,750.87	-0.4%	-0.3%	0.2%	6.8%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,299.45	-0.6%	-3.5%	-3.5%	30.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,062.74	-0.2%	0.3%	5.4%	17.8%	ZAR/USD	15.90	-0.1%	8.2%
Vietnam	1,572.46	0.5%	4.8%	2.6%	46.9%	VND/USD	22,675.00	-0.1%	-1.8%

## MSCI Emerging Markets

MSCI Frontier	669.53	0.2%	0.1%	-2.9%	17.1%	Brent Crude (\$)	80.80	-1.8%	56.0%
MSCI Frontier 100	1,546.56	0.3%	-0.4%	-1.7%	22.9%	Gold (\$)	1,798.50	0.6%	-5.1%
MSCI Emerging	1,254.69	0.1%	-1.1%	-0.8%	-2.8%	Copper (\$)	9,801.50	-0.3%	26.2%
MSCI World (USD)	3,202.44	0.1%	-0.5%	0.9%	19.0%	Coffee (\$)	209.49	1.2%	75.7%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital Plc	9.80	1.6%	108.1%	19.96	Ecobank	8.00	-8.6%	33.3%	17.01
Stanbic IBTC	38.00	0.7%	0.6%	13.84	Nigerian Breweries	48.00	-5.1%	-14.3%	411.65
Fidelity	2.56	0.4%	1.6%	8.91	UACN	10.00	-4.3%	57.8%	15.60
					UBN	4.75	-4.0%	-11.2%	19.22
					Seplat Petroleum	695.00	-3.6%	72.8%	1192.68
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Okomu Oil	142.00	142.00	0.0%	3.42	Dangote Sugar	16.45	16.30	0.9%	23.36
Dangote Cement	280.00	280.00	0.0%	49.15	Nigerian Breweries	48.00	46.50	3.2%	411.65
Presco	88.90	89.00	-0.1%	32.55	Nestle	1395.00	1350.00	3.3%	197.28
United Capital Plc	9.80	9.90	-1.0%	19.96	UBN	4.75	4.50	5.6%	19.22
Airtel Africa	915.00	930.00	-1.6%	0.83	Sterling	1.48	1.40	5.7%	6.93

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Buhaira Ntl Ins.	1.70	14.9%	-0.6%	0.01	Abu Dhabi National for Building Materials	0.26	-9.0%	1.9%	0.04
National Takaful Company	0.92	12.5%	-8.1%	0.00	Finance House	1.73	-6.5%	-8.9%	0.01
Ooredoo	7.00	7.7%	-6.9%	0.00	Fujairah Cement Industries	0.62	-6.5%	-52.8%	0.00
Gulf Medical Projects	1.82	7.1%	-24.2%	0.00	ARAM GROUP	2.95	-4.8%	-1.7%	0.01
National Bank of Umm Al Qaiwain	1.78	4.7%	-11.0%	0.00	National Corp for Tourism and Hotels	3.30	-2.9%	82.3%	0.07
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
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Abu Dhabi National Energy	1.20	1.18	1.7%	0.97
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Al Buhaira Ntl Ins.	1.70	1.63	4.3%	0.01
Umm Al Qaiwain General Inv.	1.00	1.00	0.0%	0.00	Ooredoo QPSC	7.02	6.59	6.5%	8.12

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Heliopolis Housing	4.57	8.8%	-25.1%	30.12	Cleopatra Hospital Company	4.73	-1.5%	-0.6%	1.35
T M G Holding	8.15	6.4%	24.0%	43.28	Speed Medical	1.84	-1.3%	12.4%	26.90
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.23	5.7%	-23.8%	11.31	Commercial International Bank	51.51	-0.7%	16.0%	89.69
Ezz Steel	12.96	3.9%	20.8%	26.40	Abou Kir Fertilizers	19.16	-0.3%	-7.4%	7.52
Medinet Nasr Housing	2.39	3.9%	-34.9%	19.45	Misir Fertilizers Production - Mopco	92.78	-0.2%	58.0%	3.14
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	14.01	14.19	-1.3%	94.82	Fawry For Banking TechnologyAnd Electronic Payment	12.30	12.03	2.2%	42.88
T M G Holding	8.15	8.35	-2.4%	43.28	MM Group For Industry And International Trade	5.87	5.71	2.8%	25.05
Credit Agricole Egypt	28.99	30.45	-4.8%	17.47	Abou Kir Fertilizers	19.16	18.12	5.7%	7.52
Commercial International Bank(Egypt)	51.51	54.15	-4.9%	89.69	Citadel Capital - Common Shares	1.16	1.09	6.7%	3.54
Telecom Egypt	14.60	15.35	-4.9%	21.31	Sidi Kerir Petrochemicals	6.80	6.33	7.4%	7.15

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Reliance Industries	2501.00	6.4%	26.0%	47994.845	Maruti Suzuki India	7571.00	-1.3%	-1.0%	7588.58
Divi's Laboratories Limited	4795.00	2.4%	24.8%	1476.01	Britannia Inds.	3580.00	-1.2%	0.1%	834.39
ITC	231.75	1.8%	10.9%	5478.51	Indian Oil	126.15	-1.1%	38.7%	802.71
Infosys	1722.50	1.6%	37.2%	7678.31	Indusind Bank	959.35	-1.1%	7.2%	5488.44
Tata Consumer products Ltd.	809.65	1.3%	37.3%	1418.93	HUL	2348.45	-1.1%	-2.0%	3205.22
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	204.85	209.95	-2.4%	2829.56	Hero Motocorp	2598.80	2581.10	0.7%	1626.51
Tech Mahindra	1558.35	1630.00	-4.4%	2420.34	Britannia Inds.	3580.00	3317.30	7.9%	834.39
HDFC	2870.00	3021.10	-5.0%	6377.81	Eicher Motors	2525.00	2303.70	9.6%	1322.30
Grasim Industries	1768.50	1893.00	-6.6%	1238.18	HUL	2348.45	2120.00	10.8%	3205.22
Larsen & Toubro	1849.95	1981.75	-6.7%	3572.24	Dr Reddys Lab	4599.85	4135.00	11.2%	2523.21

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	93.00	1.4%	9.4%	0.02	Nation Media Group	18.65	-3.6%	20.7%	0.24
Kenya Reinsurance Corporation Ltd	2.29	1.3%	-1.3%	0.27	Centum Investment Company Plc	14.55	-2.3%	-9.3%	1.77
Kenya Power & Lighting Limited	1.76	1.1%	2.9%	0.36	East African Breweries Limited	153.50	-1.0%	-0.5%	85.39
Diamond Trust Bank Limited	56.25	0.9%	-25.0%	0.28	Total Kenya Ltd	24.25	-0.8%	1.0%	0.03
NCBA Group Plc	23.25	0.6%	-13.1%	1.71	Nairobi Securities Exchange Plc	8.28	-0.2%	1.5%	0.85
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	10.90	11.35	-4.0%	7.19	Standard Chartered Bank Kenya Ltd	127.75	127.00	0.6%	7.86
Stanbic Holdings	93.00	99.00	-6.1%	0.02	Diamond Trust Bank Limited	56.25	55.00	2.3%	0.28
Equity Group Holdings Plc	51.50	55.00	-6.4%	331.16	Centum Investment Company Plc	14.55	14.05	3.6%	1.77
Total Kenya Ltd	24.25	27.50	-11.8%	0.03	East African Breweries Limited	153.50	148.00	3.7%	85.39
The Cooperative Bank of Kenya Ltd	12.30	14.05	-12.5%	1.28	The Cooperative Bank of Kenya Ltd	12.30	11.20	9.8%	1.28

## 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.	30.35	10.0%	-12.0%	27.67	Development Works Food Co.	181.40	-7.7%	15.2%	255.71
Amana Cooperative Insurance Co.	33.95	9.9%	-8.6%	29.43	SABIC Agri-Nutrients Co	168.40	-3.8%	108.9%	74.93
Red Sea International Co.	22.70	5.3%	2.2%	5.80	Saudi Arabian Mining Co.	75.00	-3.6%	85.2%	69.32
Tihama Advertising and Public Relations Co.	37.30	4.5%	-28.0%	31.02	Saudi Advanced Industries Co.	48.00	-2.7%	154.0%	43.19
Saudi Industrial Export Co.	83.80	4.4%	-24.9%	51.38	Banque Saudi Fransi	44.05	-2.3%	39.4%	17.45
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	64.30	64.30	0.0%	117.39	Tanmiah Food Co.	81.50	81.50	0.0%	32.16
Zamil Industrial Investment Co.	29.00	29.00	0.0%	27.12	BinDawood Holding Co.	99.00	99.00	0.0%	3.41
United International Transportation Co.	48.50	48.50	0.0%	16.88	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Electronics Co.	133.80	133.80	0.0%	25.77	Nayifat Finance Co.	34.70	33.75	2.8%	187.74
United Cooperative Assurance Co.	35.10	35.10	0.0%	3.84	National Shipping Company of Saudi Arabia	33.60	31.70	6.0%	12.43

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mr Price Group Ltd	19600.00	3.9%	14.9%	43843.42	Glencore PLC	7823.00	-2.4%	68.5%	24160.46
Nedbank Group Ltd	16568.00	2.9%	28.0%	20264.92	BHP Group PLC	42287.00	-2.3%	8.7%	37200.04
Absa Group Ltd	13717.00	2.3%	14.4%	28965.20	Anglo American PLC	60086.00	-2.2%	26.6%	53210.90
Bidvest Group Ltd/The	18421.00	2.3%	17.3%	14083.59	Gold Fields Ltd	16900.00	-1.5%	22.8%	35380.66
Shoprite Holdings Ltd	19692.00	2.1%	40.7%	18880.39	Sibanye Stillwater Ltd	4970.00	-1.1%	-17.2%	30903.41
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)
Cie Financiere Richemont SA	23900.00	24000.00	-0.4%	35432.20	Reinet Investments	26392.00	25904.00	1.9%	5852.21
Investec PLC	8249.00	8400.00	-1.8%	7551.79	SPAR Group Ltd/The	17058.00	16701.00	2.1%	15905.89
Investec Ltd	8220.00	8383.00	-1.9%	4718.42	Sanlam Ltd	5793.00	5439.00	6.5%	22170.88
Glencore PLC	7823.00	8069.00	-3.0%	24160.46	British American Tobacco PLC	55102.00	51051.00	7.9%	21969.39
Shoprite Holdings Ltd	19692.00	20490.00	-3.9%	18880.39	Naspers Ltd	250403.00	229087.00	9.3%	136539.50

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phat Dat Real Estate Development Corp	94200.00	4.2%	124.7%	570098.40	Ho Chi Minh City Devp	32500.00	-3.0%	71.1%	281089.25
Saigon Securities Inc	55000.00	3.4%	147.2%	1398116.50	Saigon Beer Alcohol Beverage Corp.	165000.00	-1.8%	-14.7%	16599.00
No Va Land Invest	109000.00	2.4%	126.6%	463925.80	Bank for Inv. and Devp	45350.00	-1.5%	-5.3%	121846.38
Vietcombank	107100.00	2.2%	9.4%	157779.72	Phu Nhuan Jewelry	104100.00	-1.5%	29.8%	53132.64
FPT Corp	100000.00	2.1%	98.4%	548740.00	Techcombank	54900.00	-1.1%	74.3%	987156.90
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Mobile World Inv. Corp	145000.00	145000.00	0.0%	122626.50	Vinamilk	87500.00	82573.01	6.0%	190347.50
Saigon Securities Inc	55000.00	55500.00	-0.9%	1398116.50	Vingroup JSC	94000.00	82222.23	14.3%	131769.20
Tien Phong Commercial Joint Stock Bank	49200.00	49850.00	-1.3%	211791.24	Saigon Beer Alcohol Beverage Corp.	165000.00	139800.00	18.0%	16599.00
Masan Group Corp	157500.00	159700.00	-1.4%	165438.00	Vincom Retail	30850.00	25100.00	22.9%	368885.79
FPT Corp	100000.00	101800.00	-1.8%	548740.00	Bank for Inv. and Devp	45350.00	36500.00	24.2%	121846.38

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