

Daily Market Report

29 November 2021

JSE

JSE All-Share Index dropped by 2.75% to close at 68,615.00 points on Friday, as Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 195.80 points, up by 0.89% on Friday with Citab Côte d'Ivoire and Nestle Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.46% to close at 43308.29 points on Friday, as Insurance sector recorded gains.

EGX

EGX 30 Index fell 1.34% to close at 11,277.83 points on Sunday, as the market lost LE 7.4 billion of market capitalization, amid foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.95% to close at 990.78 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.75%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.89%
NSE Nigerian Stock Exchange	▲ 0.46%
EGX Egyptian Stock Exchange	▼ 1.34%
ESG Casablanca Stock Exchange	▼ 0.95%

African Markets

Nigeria: NSE 30 Index decreased by 0.14% and closed at 1,748.42 points on Friday. Nigerian Breweries and International Breweries were the top losers.

Egypt: EGX 30 Index fell 1.34% to close at 11,277.83 points on Sunday, as the market lost LE 7.4 billion of market capitalization, amid foreign selling.

Kenya: NSE 20 Index increased by 0.77% and closed at 1,886.35 points on Friday. Kenya Reinsurance Corporation and Centum Investment Company were the top gainers.

South Africa: JSE Top 40 Index slumped by 2.58% to close at 62,410.83 points on Friday, as Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.64
INTERBANK RATES	
OBB	15.00 ▲
Overnight	15.67 ▲

Other Emerging Markets

Abu Dhabi: ADX General fell by 1.82% to close at 8,299.94 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index remained unchanged at 447.61 points.

Vietnam: VN-30 Index decreased by 0.38% to close at 1,566.55 points on Friday, as the blue-chip companies recorded losses. MSCI Vietnam rose by 0.40% to close at 1,077.51 points.

Saudi Arabia: Tadawul All Share Index plunged 4.53% to close at 10,787.79 points on Sunday, as losses in the Building & Construction, Hotels & Tourism and Real Estate Development sectors pushed shares lower. MSCI Saudi Arabia fell 4.33% to close 1,493.24 points.

India: Nifty 50 market declined sharply by 2.91% to close at 17,026.45 points on Friday, as losses in the Real Estate, Metals and Auto sectors pushed shares lower. MSCI India fell 2.93% to close at 1,993.90 points.

News

Nigeria:

FG may extend 2021 budget implementation to next year
Currency in circulation rose by N129bn in October -CBN

Amid Ban of Corporates, Individuals, CBN OMO Sales Drop to Five-year Low

Kenya:

Kenya intensifies surveillance over Covid 'super variant' in SA
50pc of firms hit by Covid target full recovery in June
Safaricom now invites bids for Kenya Power smart anti-theft system

Abu Dhabi:

UAE's Emirates Global Aluminium, GE sign pact to cut greenhouse gases
Etihad Credit Insurance and Traveling sign deal to boost trade in Mena region
Amazon picks Abu Dhabi for most cutting-edge fulfilment centre in the Middle East

Saudi Arabia:

OPEC+ delays technical meetings to review market conditions
Saudi Arabia's net foreign assets decline 3.3% in October
Saudi Tadawul Group sets IPO offer price at SR105 per share

Egypt:

Egypt, Israel sign MoU to increase gas supplies for re-exporting
Ibnsina Pharma's EGM approves capital raise through bonus shares
Egypt's non-oil commodity exports jump by 40%: CAPMAS

South Africa:

South Africa Eschews Strict Virus Curbs, Assesses Variant Impact
Europe closes to SA on fears of new virus strain
Ardagh Group has agreed to acquire Consol Holdings for R10bn

India:

Centre revises guidelines for international arrivals, to be effective from Dec 1
Reliance Jio hikes prepaid plan tariffs by 20%
Paytm reports 461cr loss for quarter ended September

Vietnam:

Govt plans to issue bonds in foreign currency
Vietjet signs 150-million-USD deal with Swiss MRO service provider
Foreign capital flow in Vietnam hit 26.46 billion USD in 11 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,299.94	-1.8%	-1.8%	5.5%	64.5%	AED/USD	3.67	0.0%	0.0%
Egypt	11,277.83	-1.3%	-1.3%	-1.2%	4.0%	EGP/USD	15.72	0.0%	-0.1%
India	17,026.45	-2.9%	0.0%	-3.7%	21.8%	INR/USD	74.87	0.5%	2.5%
Kenya	1,886.35	0.8%	0.0%	-3.8%	1.0%	KES/USD	112.55	0.1%	3.1%
Nigeria	1,748.42	-0.1%	0.0%	0.1%	6.6%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	10,787.79	-4.5%	-4.5%	-7.8%	24.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,410.83	-2.6%	0.0%	2.6%	14.8%	ZAR/USD	16.23	2.1%	10.5%
Vietnam	1,566.55	-0.4%	0.0%	2.2%	46.3%	VND/USD	22,679.00	0.0%	-1.7%

MSCI Emerging Markets

MSCI Frontier	666.63	-0.4%	0.0%	-3.3%	16.6%	Brent Crude (\$)	72.72	-10.0%	40.4%
MSCI Frontier 100	1,537.91	-0.6%	0.0%	-2.2%	22.3%	Gold (\$)	1,788.10	-0.6%	-5.6%
MSCI Emerging	1,223.13	-2.5%	0.0%	-3.3%	-5.3%	Copper (\$)	9,460.00	-3.5%	21.8%
MSCI World (USD)	3,131.98	-2.2%	0.0%	-1.3%	16.4%	Coffee (\$)	208.37	-0.4%	74.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Airtel Africa	950.00	3.8%	11.5%	395.70	Nigerian Breweries	46.50	-3.1%	-17.0%	42.32
UBN	4.80	1.1%	-10.3%	4.35	International Breweries	5.00	-2.9%	-16.0%	5.30
Sterling	1.49	0.7%	-27.0%	4.87	Flour Mills	29.50	-1.7%	13.5%	16.11
Guinness	36.60	0.3%	92.6%	23.97	Access	9.00	-1.1%	6.5%	252.99
					Cap	19.30	-1.0%	-3.5%	6.85
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%	1.28	Nigerian Breweries	46.50	46.50	0.0%	42.32
Dangote Cement	280.00	280.00	0.0%	17.07	Dangote Sugar	16.45	16.30	0.9%	6.48
Airtel Africa	950.00	950.00	0.0%	395.70	Nestle	1395.00	1350.00	3.3%	665.30
Presco	88.90	89.00	-0.1%	6.54	Sterling	1.49	1.40	6.4%	4.87
United Capital Plc	9.80	9.90	-1.0%	22.82	UBN	4.80	4.50	6.7%	4.35

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.	1.80	5.9%	5.3%	18.38	National Corp for Tourism and Hotels	2.97	-10.0%	64.1%	0.01
Abu Dhabi National for Building Materials	0.27	3.4%	5.4%	0.01	Eshraq Investments	0.38	-9.9%	19.8%	11.98
National Marine Dredging	13.16	0.8%	119.0%	16.60	Manazel PJSC	0.53	-9.9%	50.3%	13.38
International Holding	152.00	0.7%	261.9%	299.36	Gulf Medical Projects	1.64	-9.9%	-31.7%	0.00
					Fujairah Cement Industries	0.56	-9.8%	-57.4%	0.14
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.	1.80	1.80	0.0%	18.38	Gulf Medical Projects	1.64	1.62	1.2%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Abu Dhabi National Energy	1.18	1.15	2.6%	7.20
The National Investor PRJSC	0.60	0.60	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	Ooredoo QPSC	6.93	6.59	5.1%	6.96

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.30	3.1%	-21.5%	6.87	Orascom Development Egypt	5.46	-5.9%	11.4%	1.00
Misr Fertilizers Production Company - Mopco	93.80	1.1%	59.7%	1.52	Alexandria Mineral Oils Company	3.51	-5.1%	12.5%	2.45
Heliopolis Housing	4.61	0.9%	-24.4%	20.06	Pioneers Properties For Urban Devp	2.34	-4.1%	0.0%	1.30
Speed Medical	1.86	0.8%	13.3%	7.58	Sidi Kerir Petrochemicals	6.57	-3.4%	-15.3%	7.04
MM Group For Industry And International Trade	5.91	0.7%	-5.8%	8.42	Palm Hills Development	1.77	-3.2%	29.5%	2.25
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-Hermes Holding Company	13.80	14.19	-2.7%	25.87	Fawry For Banking Technology And Electronic Payment	11.92	11.55	3.2%	11.34
T M G Holding	7.99	8.35	-4.3%	16.44	Sidi Kerir Petrochemicals	6.57	6.33	3.8%	7.04
Commercial International Bank(Egypt)	51.12	54.15	-5.6%	35.22	Abou Kir Fertilizers	18.89	18.12	4.2%	2.43
Telecom Egypt	14.38	15.35	-6.3%	5.95	Citadel Capital - Common Shares	1.14	1.09	4.3%	2.41
Credit Agricole Egypt	28.26	30.45	-7.2%	0.39	MM Group For Industry And International Trade	5.91	5.61	5.3%	8.42

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Cipla	965.00	7.2%	17.7%	13808.966	Jsw Steel	630.00	-7.5%	62.7%	5746.11
Dr Reddys Lab	4750.00	3.5%	-8.7%	5089.72	Tata Motors	459.40	-6.8%	149.9%	24303.59
Divi's Laboratories Limited	4940.00	2.9%	28.6%	7753.72	Hindalco Industries	417.70	-6.6%	73.6%	6319.35
Nestle India Limited	19250.00	0.4%	4.7%	1086.09	Adani Ports And Sez.	715.00	-6.2%	47.8%	5326.29
					Indusind Bank	899.95	-6.2%	0.6%	6227.39
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Cipla	965.00	1005.00	-4.0%	13808.97	Hero Motocorp	2526.80	2505.15	0.9%	1740.35
Bharti Airtel	735.85	781.80	-5.9%	8300.58	Bharat Petroleum	377.40	357.00	5.7%	3835.43
Nestle India Limited	19250.00	20609.15	-6.6%	1086.09	Eicher Motors	2440.75	2303.70	5.9%	1365.65
Tech Mahindra	1519.00	1630.00	-6.8%	2329.66	Britannia Inds.	3566.60	3317.30	7.5%	1332.34
Infosys	1689.55	1848.00	-8.6%	7646.67	HDFC Life Insurance Company	669.75	617.40	8.5%	1513.97

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corporation Ltd	2.36	3.1%	1.7%	0.03	Stanbic Holdings	91.00	-2.2%	7.1%	0.02
Centum Investment Company Plc	14.95	2.7%	-6.9%	0.15	Kengen Limited	4.40	-1.1%	-6.6%	3.23
Safaricom Plc	38.00	2.7%	10.9%	2386.34	KCB Group Plc	43.85	-0.3%	15.1%	18.90
British American Tobacco Kenya Ltd	434.00	2.4%	20.2%	1.22	Standard Chartered Bank Kenya Ltd	127.50	-0.2%	-11.6%	17.01
Kenya Power & Lighting Limited	1.79	1.7%	4.7%	0.73					
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	10.95	11.35	-3.5%	13.97	Standard Chartered Bank Kenya Ltd	127.50	127.00	0.4%	17.01
Equity Group Holdings Plc	51.50	55.00	-6.4%	37.03	Diamond Trust Bank Limited	57.00	55.00	3.6%	0.58
Stanbic Holdings	91.00	99.00	-8.1%	0.02	East African Breweries Limited	154.00	148.00	4.1%	1.34
Total Kenya Ltd	24.50	27.50	-10.9%	0.00	Centum Investment Company Plc	14.95	14.05	6.4%	0.15
The Cooperative Bank of Kenya Ltd	12.35	14.05	-12.1%	5.54	The Cooperative Bank of Kenya Ltd	12.35	11.30	9.3%	5.54

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.	33.35	9.9%	-3.3%	58.59	Rabigh Refining and Petrochemical Co.	21.18	-10.0%	53.3%	178.76
Amana Cooperative Insurance Co.	37.30	9.9%	0.4%	43.23	Saudi Kayan Petrochemical Co.	15.76	-9.9%	10.2%	215.27
Development Works Food Co.	185.00	2.0%	17.5%	124.00	Al Abdullatif Industrial Investment Co.	26.75	-9.9%	74.8%	17.19
National Company for Learning and Education	60.70	1.3%	16.3%	5.22	Jazan Energy and Development Co.	19.96	-9.9%	20.0%	27.31
Wataniya Insurance Co.	44.70	1.0%	-2.8%	5.99	Al Hassan Ghazi Ibrahim Shaker Co.	20.04	-9.9%	24.3%	33.39
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	61.00	61.00	0.0%	187.31	Savola Group	32.10	32.10	0.0%	25.19
Zamil Industrial Investment Co.	26.80	26.80	0.0%	30.17	Tanmiah Food Co.	76.20	76.20	0.0%	14.34
United Electronics Co.	131.00	131.00	0.0%	23.99	BinDawood Holding Co.	96.50	96.50	0.0%	10.70
United Cooperative Assurance Co.	33.50	33.50	0.0%	14.38	Nayifat Finance Co.	32.85	32.85	0.0%	120.29
SEDCO Capital REIT Fund	11.70	11.70	0.0%	2.01	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	17516.00	3.6%	27.3%	55107.37	Sanlam Ltd	5270.00	-9.0%	-10.3%	43793.54
AngloGold Ashanti Ltd	32657.00	2.6%	-4.7%	37440.53	Absa Group Ltd	12495.00	-8.9%	4.2%	80487.65
Prosus NV	132400.00	1.7%	-17.4%	196220.64	Nedbank Group Ltd	15264.00	-7.9%	17.9%	67802.73
Naspers Ltd	251315.00	0.4%	-16.8%	206971.22	Bid Corp Ltd	28798.00	-7.8%	9.5%	35462.46
					Old Mutual Ltd	1220.00	-7.4%	19.9%	29323.97
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)
Gold Fields Ltd	17516.00	17716.00	-1.1%	55107.37	SPAR Group Ltd/The	16438.00	16438.00	0.0%	19601.71
Cie Financiere Richemont SA	23815.00	24283.00	-1.9%	123529.31	Reinet Investments SCA	25650.00	25623.00	0.1%	7971.20
Glencore PLC	7514.00	8069.00	-6.9%	19765.90	Sanlam Ltd	5270.00	5229.00	0.8%	43793.54
British American Tobacco PLC	55047.00	59245.00	-7.1%	65236.42	Sibanye Stillwater Ltd	4790.00	4479.00	6.9%	55648.98
Investec Ltd	7727.00	8383.00	-7.8%	13125.76	British American Tobacco PLC	55047.00	51051.00	7.8%	65236.42

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vingroup JSC	98500.00	4.8%	2.4%	855147.45	Ho Chi Minh City Devp	31350.00	-3.5%	65.0%	247840.56
Vietnam Prosperity	39200.00	3.2%	117.1%	1754164.72	Tien Phong Commercial Joint Stock Bank	47500.00	-3.5%	77.2%	157662.00
Phat Dat Real Estate Development Corp	95800.00	1.7%	128.6%	536374.62	Saigon Beer Alcohol Beverage Corp.	160200.00	-2.9%	-17.2%	33930.36
No Va Land Invest	110700.00	1.6%	130.2%	579990.51	Saigon Securities Inc	53500.00	-2.7%	140.5%	1649565.50
Vinamilk	88300.00	0.9%	-16.7%	266286.31	Phu Nhuan Jewelry	101500.00	-2.5%	26.5%	82397.70
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Masan Group Corp	157500.00	159700.00	-1.4%	178258.50	Vinamilk	88300.00	82573.01	6.9%	266286.31
Mobile World Inv. Corp	141500.00	145500.00	-2.7%	178629.60	Saigon Beer Alcohol Beverage Corp.	160200.00	139800.00	14.6%	33930.36
FPT Corp	98900.00	101800.00	-2.8%	197424.18	Vingroup JSC	98500.00	82222.23	19.8%	855147.45
Saigon Securities Inc	53500.00	55500.00	-3.6%	1649565.50	Vincom Retail	30400.00	25100.00	21.1%	385994.88
Vietnam Prosperity	39200.00	40722.66	-3.7%	1754164.72	Vietjet Aviation	129500.00	105800.00	22.4%	118026.30

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