

Daily Market Report

02 December 2021

JSE

JSE All-Share Index rose by 1.03% to close at 71,198.06 points on Wednesday, as Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 197.27 points, down by 0.53% on Wednesday with Sicom Côte d'Ivoire and CFAO Motors Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index dropped by 1.81% to close at 42,463.16 points on Wednesday, as Banking, Oil & Gas and Consumer Goods sectors recorded losses.

EGX

EGX 30 Index increased 0.21% to close at 11,420.00 points on Wednesday, as the market gained LE 2.54 billion of market cap, amid foreign purchases.

ESG

Casablanca ESG 10 Index increased 0.88% to close at 988.26 points on Wednesday.

African Markets

Nigeria: NSE 30 Index dropped by 2.25% and closed at 1,706.84 points on Wednesday. MTNN and Access were the top losers.

Egypt: EGX 30 Index increased 0.21% to close at 11,420.00 points on Wednesday, as the market gained LE 2.54 billion of market cap, amid foreign purchases.

Kenya: NSE 20 Index declined by 0.28% and closed at 1,866.08 points on Wednesday. KCB Group and Diamond Trust Bank Limited were the top losers.

South Africa: JSE Top 40 Index advanced by 1.13% to close at 64,785.66 points on Wednesday, as Industrial, Financial and Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.03%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.53%

NSE
Nigerian Stock Exchange ▼ 1.81%

EGX
Egyptian Stock Exchange ▲ 0.21%

ESG
Casablanca Stock Exchange ▲ 0.88%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.7
INTERBANK RATES	
OBB	15.50 ▼
Overnight	15.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General was closed on Wednesday on the account of UAE National Day.

Vietnam: VN-30 Index rose by 0.79% to close at 1,549.81 points on Wednesday, as the blue-chip companies recorded gains. MSCI Vietnam increased by 0.34% to close at 1,074.46 points.

Saudi Arabia: Tadawul All Share Index increased by 0.82% to close at 10,849.96 points on Wednesday, as gains in the Retail, Media & Publishing and Financial Services sectors led shares higher. MSCI Saudi Arabia rose 0.94% to close 1,499.23 points.

India: Nifty 50 market jumped 1.08% to close at 17,166.90 points on Wednesday, as gains in the Metals, Banking and Auto sectors led shares higher. MSCI India rose by 0.99% to close at 2,005.60 points.

News

Nigeria:

FG expects new oil projects amid \$42bn deals
NNPC partners IPPG to boost industry reforms
Manufacturing output rebounds, hits N7tn amid unfavourable environment

Kenya:

Kenya's New KSh40 Billion Kipevu Oil Terminal Nears Completion
Centum pledges 30pc dividends pay to investors
Relief for mobile lenders as CBK to stay clear interest caps

Abu Dhabi:

Adnoc approves \$127bn spending plan as it unveils increase in hydrocarbon reserves
ADQ and Taqa sign energy deal with Kazakhstan's wealth fund
Adnoc & Taqa to become shareholders in Abu Dhabi's Masdar with Mubadala

Saudi Arabia:

Saudi Arabia's economy set to grow 7% in 2022 driven by oil sector
NADEC consortium completes Second Milling Company acquisition
EY signs MoU with PMI-KSA to support growth of Saudi's project management

Egypt:

Egypt, UAE sign MoU for localizing defence industries
Non-govt deposits in local currency with banks up to EGP 4.308trn in Oct 21
Egypt, Spain renews financial cooperation protocol worth €400M

South Africa:

SA factory activity expands at faster pace in November – Absa PMI
Rising fuel costs heighten South African inflation, growth risks
Bidcorp reports record 1Q trading results and gains in market share

India:

GST collection hits second highest level of Rs 1.3 lakh crore in Nov
Exports up 27%, but trade deficit reaches record high
PE-VC funds drop over 50% from October to \$4.8 billion in Nov

Vietnam:

HNX to develop commodity derivative market
Disbursement of public investment capital up 14.7% in Nov
Central city calls for ICT investment from South Korea

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,546.52	0.0%	1.1%	0.0%	69.4%	AED/USD	3.67	0.0%	0.0%
Egypt	11,420.00	0.2%	-0.1%	0.2%	5.3%	EGP/USD	15.71	-0.3%	-0.1%
India	17,166.90	1.1%	0.8%	1.1%	22.8%	INR/USD	74.91	-0.3%	2.5%
Kenya	1,866.08	-0.3%	-1.1%	-0.3%	-0.1%	KES/USD	112.60	0.0%	3.1%
Nigeria	1,706.84	-2.3%	-2.4%	-2.3%	4.1%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	10,849.96	0.8%	-4.0%	0.8%	24.9%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,785.66	1.1%	3.8%	1.1%	19.1%	ZAR/USD	15.83	-1.2%	7.8%
Vietnam	1,549.81	0.8%	-1.1%	0.8%	44.7%	VND/USD	22,715.00	0.1%	-1.6%

MSCI Emerging Markets

MSCI Frontier	663.48	1.1%	-0.5%	1.1%	16.1%	Brent Crude (\$)	68.87	-2.4%	33.0%
MSCI Frontier 100	1,526.33	1.0%	-0.8%	1.0%	21.3%	Gold (\$)	1,784.30	0.4%	-5.8%
MSCI Emerging	1,226.81	1.2%	0.3%	1.2%	-5.0%	Copper (\$)	9,444.00	0.02%	21.6%
MSCI World (USD)	3,087.98	-0.4%	-1.4%	-0.4%	14.8%	Coffee (\$)	200.01	-0.4%	67.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	2.28	7.5%	117.1%	1.99	MTNN	171.00	-10.0%	0.6%	88.27
Wema	0.80	1.3%	15.9%	1.41	Access	9.00	-5.3%	6.5%	71.13
Nigerian Breweries	46.80	0.6%	-16.4%	26.44	FCMB	2.99	-3.5%	-10.2%	4.32
Lafarge Africa	25.00	0.6%	18.8%	242.16	International Breweries	4.70	-2.1%	-21.0%	10.45
United Capital Plc	9.70	0.5%	105.9%	37.86	Ecobank	8.20	-1.8%	36.7%	15.33
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%	3.00	Nigerian Breweries	46.80	46.50	0.6%	26.44
Dangote Cement	280.00	280.00	0.0%	41.40	UBN	4.55	4.50	1.1%	2.41
Airtel Africa	950.00	950.00	0.0%	56.15	Nestle	1395.00	1350.00	3.3%	53.85
Presco	87.80	89.00	-1.3%	3.82	Sterling	1.46	1.40	4.3%	9.53
United Capital Plc	9.70	9.90	-2.0%	37.86	International Breweries	4.70	4.50	4.4%	10.45

Abu Dhabi*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ras Al Khaimah Poultry	2.03	14.7%	40.0%	0.00	Oman & Emirates Investment Holding Co	0.32	-10.0%	-19.0%	0.00
Ras Al Khaimah Cement Investment Co	7.59	12.3%	123.9%	93.51	Zee Store Prjsc	26.60	-4.9%	153.3%	17.57
Gulf Cement	0.74	6.2%	-12.4%	0.40	Waha Capital	1.66	-4.6%	38.3%	28.73
Abu Dhabi National Energy	1.41	4.4%	-2.1%	98.19	Palms Sports	11.52	-4.0%	-12.7%	14.95
Al Qudra Holding	6.71	3.4%	510.0%	12.21	Response Plus Holding	10.18	-3.1%	-18.6%	0.66
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	National Bank of Fujairah	5.00	4.98	0.4%	0.00
Al Buhaira Ntl Ins.	1.80	1.80	0.0%	0.00	Gulf Medical Projects	1.64	1.62	1.2%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Ooredoo QPSC	6.80	6.59	3.2%	34.17
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	Du	6.08	5.62	8.2%	3.07

*Market closed on 1/12

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Citadel Capital - Common Shares	1.20	3.7%	-16.3%	11.41	Cairo For Investment And Real Estate Development	13.67	-2.4%	-6.7%	7.61
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.35	3.5%	-19.8%	4.70	Fawry For Banking Technology And Electronic Payment	12.70	-2.2%	-9.6%	50.26
Egyptian for Tourism Resorts	1.43	3.2%	1.6%	7.24	Egyptian Financial Group-Hermes	14.22	-1.3%	16.6%	15.87
Telecom Egypt	14.79	3.0%	24.0%	24.33	T M G Holding	8.13	-0.7%	23.7%	10.54
Palm Hills Development Company	1.84	2.7%	34.8%	12.66	Cleopatra Hospital Company	4.50	-0.7%	-5.5%	2.43
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	14.22	14.42	-1.4%	15.87	Abou Kir Fertilizers	18.81	18.12	3.8%	2.34
T M G Holding	8.13	8.35	-2.6%	10.54	Eastern Company	11.28	10.50	7.4%	18.43
Telecom Egypt	14.79	15.35	-3.6%	24.33	Sidi Kerir Petrochemicals	6.85	6.33	8.2%	5.80
Credit Agricole Egypt	28.99	30.45	-4.8%	0.30	MM Group For Industry And International Trade	6.08	5.61	8.4%	5.22
Commercial International Bank(Egypt)	51.51	54.15	-4.9%	118.71	Gadwa For Industrial Development	1.05	0.95	9.8%	0.57

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	934.50	5.8%	4.4%	13518.865	Cipla	928.35	-4.4%	13.2%	3692.53
Jsw Steel	638.75	5.0%	65.0%	4118.84	Divi's Laboratories Limited	4766.00	-2.3%	24.1%	2905.68
Tata Motors	478.00	4.2%	160.0%	13275.60	Ultratech Cement	7320.00	-1.5%	38.4%	3792.05
Axis Bank	680.00	3.7%	9.6%	10921.75	Dr Reddys Lab	4605.30	-1.5%	-11.5%	1965.31
Adani Ports And Sez.	709.00	3.7%	46.6%	3874.33	Bharti Airtel	722.00	-0.9%	41.7%	7634.52
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tech Mahindra	1588.00	1630.00	-2.6%	4360.17	Hero Motocorp	2450.00	2424.05	1.1%	1890.00
Nestle India Limited	19372.40	20609.15	-6.0%	1062.54	Bajaj Auto	3252.20	3161.00	2.9%	1793.58
Infosys	1717.00	1848.00	-7.1%	8967.26	Bharat Petroleum	369.70	357.00	3.6%	2411.14
Cipla	928.35	1005.00	-7.6%	3692.53	Eicher Motors	2438.10	2303.70	5.8%	4144.82
Bharti Airtel	722.00	781.80	-7.6%	7634.52	Britannia Inds.	3540.00	3317.30	6.7%	1116.37

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	18.80	3.6%	21.7%	0.66	KCB Group Plc	42.25	-2.6%	10.9%	4.83
Bamburi Cement Limited	35.50	0.7%	-6.2%	0.16	Diamond Trust Bank Limited	54.75	-2.2%	-27.0%	2.21
Standard Chartered Bank Kenya Ltd	129.00	0.6%	-10.6%	21.38	Total Kenya Ltd	23.75	-2.1%	-1.0%	0.03
WPP Scangroup Plc	4.02	0.2%	-33.0%	0.36	Equity Group Holdings Plc	48.25	-1.5%	32.0%	14.98
Nairobi Securities Exchange	8.66	0.2%	6.1%	0.15	Absa Bank Kenya	10.90	-1.4%	12.8%	7.21
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	11.40	-4.4%	7.21	Diamond Trust Bank Limited	54.75	54.00	1.4%	2.21
Stanbic Holdings	91.75	99.00	-7.3%	0.01	Standard Chartered Bank Kenya Ltd	129.00	127.00	1.6%	21.38
Equity Group Holdings Plc	48.25	55.00	-12.3%	14.98	East African Breweries Limited	152.00	148.00	2.7%	7.51
Total Kenya Ltd	23.75	27.50	-13.6%	0.03	The Cooperative Bank of Kenya Ltd	12.05	11.30	6.6%	4.24
British American Tobacco Kenya Ltd	430.00	500.00	-14.0%	60.37	Centum Investment Company Plc	15.05	14.05	7.1%	2.83

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Metal Manufacturing and Casting Co.	26.45	9.9%	-21.3%	21.47	Amana Cooperative Insurance Co.	35.50	-3.9%	-4.4%	47.52
Saudi Arabian Fertilizer Co.	439.00	8.7%	444.7%	282.58	Tihama Advertising and Public Relations	37.80	-3.8%	-27.0%	61.43
Banque Saudi Fransi	43.45	8.1%	37.5%	25.02	Al-Baha Investment and Development	30.80	-3.5%	-21.2%	19.50
Aldrees Petroleum and Transport Services Co.	69.70	6.4%	7.4%	28.52	National Petrochemical Co.	38.70	-3.3%	16.4%	8.63
Alkhaleej Training and Education Co.	19.50	4.3%	-13.2%	47.78	Etihad Atheeb Telecommunication	23.14	-2.9%	109.2%	13.62
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	61.40	61.40	0.0%	150.54	Savola Group	31.55	31.55	0.0%	26.92
Zamil Industrial Investment	27.70	27.70	0.0%	38.61	Tanmiah Food Co.	77.70	77.70	0.0%	7.52
United Electronics Co.	130.00	130.00	0.0%	17.38	BinDawood Holding	96.10	96.10	0.0%	6.08
United Cooperative Assurance Co.	33.90	33.90	0.0%	5.39	Nayifat Finance Co.	32.85	32.85	0.0%	95.43
Taiba Investments Co.	32.55	32.55	0.0%	15.03	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)
Anglo American Platinum Ltd	177844.00	4.6%	30.8%	41776.44	Gold Fields Ltd	18503.00	-1.7%	34.5%	88164.32
MTN Group	16873.00	4.4%	180.3%	92755.91	Vodacom Group Ltd	13187.00	-1.2%	6.0%	19995.00
Discovery Ltd	13895.00	4.3%	-9.5%	15467.54	BHP Group PLC	43578.00	-0.2%	12.0%	47276.29
Impala Platinum Holdings Ltd	21081.00	4.2%	4.4%	116068.42	SPAR Group Ltd/The	16228.00	-0.2%	-14.4%	23696.87
Mr Price Group Ltd	20700.00	4.0%	21.3%	32420.42	British American Tobacco PLC	54050.00	-0.2%	-0.9%	54201.88
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	23712.00	24338.00	-2.6%	82660.53	SPAR Group Ltd/The	16228.00	16161.00	0.4%	23696.87
Gold Fields Ltd	18503.00	19021.00	-2.7%	88164.32	Reinet Investments SCA	26502.00	25623.00	3.4%	7286.43
Investec Ltd	8120.00	8383.00	-3.1%	10924.79	British American Tobacco PLC	54050.00	51051.00	5.9%	54201.88
Shoprite Holdings Ltd	19833.00	20490.00	-3.2%	30697.62	Naspers Ltd	246938.00	229087.00	7.8%	154521.95
Investec PLC	8114.00	8400.00	-3.4%	11342.94	Sanlam Ltd	5689.00	5229.00	8.8%	33937.80

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Tien Phong Commercial Joint Stock Bank	48250.00	7.0%	80.0%	264424.48	Vietjet Aviation	120000.00	-2.0%	-4.0%	98280.00
Ho Chi Minh City Devp	32000.00	4.9%	68.4%	202886.40	Vinhomes	82900.00	-2.0%	21.7%	562683.75
PetroVietnam Power Corp	14000.00	3.7%	4.7%	265615.00	Saigon Securities Inc	55200.00	-1.3%	148.1%	1283720.16
No Va Land Invest	114000.00	3.6%	137.0%	437554.80	Khang Dien House Trading & Investment	46000.00	-1.0%	72.7%	49459.20
Sai Gon Thuong Tin Commercial	29900.00	3.5%	76.9%	575365.70	Phat Dat Real Estate Development Corp	93000.00	-0.6%	121.9%	299339.10
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Tien Phong Commercial Joint Stock Bank	48250.00	49850.00	-3.2%	264424.48	Vinamilk	87500.00	82573.01	6.0%	165768.75
FPT Corp	98200.00	101800.00	-3.5%	123231.18	Saigon Beer Alcohol Beverage Corp.	156500.00	139800.00	11.9%	8138.00
Saigon Securities Inc	55200.00	57700.00	-4.3%	1283720.16	Vietjet Aviation	120000.00	105800.00	13.4%	98280.00
Mobile World Inv. Corp	138900.00	145500.00	-4.5%	207849.96	Vietcombank	99000.00	85500.00	15.8%	54598.50
Ho Chi Minh City Devp	32000.00	33950.00	-5.7%	202886.40	Vincom Retail	29700.00	25100.00	18.3%	213938.01

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