

Daily Market Report

07 December 2021

JSE

JSE All-Share Index increased by 0.30% to close at 71,016.63 points on Monday, as Resources and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 196.32 points, down by 0.31% on Monday with Sicom Côte d'Ivoire & Logistics and Bank of Africa – Benin being the top losers.

NSE

NSE All-Share Index decreased by 0.38% to close at 42,008.60 points on Monday, as Insurance, Banking, Industrial, Oil & Gas and Consumer Goods sectors recorded losses.

EGX

EGX 30 Index increased 1.00% to close at 11,514.87 points on Monday, as the market gained LE 4.62 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index decreased 0.52% to close at 985.58 points on Monday.

African Markets

Nigeria: NSE 30 Index decreased by 0.53% and closed at 1,682.49 points on Monday. Lafarge Africa and Fidelity were the top losers.

Egypt: EGX 30 Index increased 1.00% to close at 11,514.87 points on Monday, as the market gained LE 4.62 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index fell by 0.94% and closed at 1,822.26 points on Monday. Total Kenya and Stanbic Holdings were the top losers.

South Africa: JSE Top 40 Index increased by 0.45% to close at 64,598.46 points on Monday, as Resources and Financial sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.30%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.31%

NSE

Nigerian Stock Exchange ▼ 0.38%

EGX

Egyptian Stock Exchange ▲ 1.00%

ESG

Casablanca Stock Exchange ▼ 0.52%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.74
INTERBANK RATES	
OBB	15.50 ↔
Overnight	15.75 ↔

Other Emerging Markets

Abu Dhabi: ADX General advanced by 2.59% to close at 8,999.32 points on Monday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE surged by 7.60% to close at 484.36 points.

Vietnam: VN-30 Index declined further by 1.53% to close at 1,480.92 points on Monday, as the blue-chip companies recorded losses. MSCI Vietnam fell by 1.24% to close at 1041.42 points.

Saudi Arabia: Tadawul All Share Index declined by 1.09% to close at 11,021.07 points on Monday, as losses in the Telecoms & IT, Insurance and Financial Services sectors led shares lower. MSCI Saudi Arabia dropped by 1.56% to close 1,515.39 points.

India: Nifty 50 market fell by 1.65% to close at 16,912.25 points on Monday, as losses in the IT, Technology and Healthcare sectors led shares lower. MSCI India dropped by 1.81% to close at 1975.28 points.

News

Nigeria:

Nigeria records N8.9tn trade deficit in nine months, expert blames insecurity
Nigeria's imports rise to N8.2tn in Q3 – NBS
FCMB signs \$35m deal with European development institution

Kenya:

Shilling decline boosts value of dollar deposits
NHC Unveils KSh25 Billion Affordable Housing Project
Corporate earnings tax misses target by Sh9bn

Abu Dhabi:

UAE's Julphar signs licence, production deal for hypertension drug
Abu Dhabi's Chimera to invest \$100m in Naguib Sawiris's Gemini
ADIB launches digital car marketplace in the UAE

Saudi Arabia:

ACWA Power signs \$2bln project finance MoU with Natixis CIB
Saudi PIF to sell STC stake; could raise up to \$3.1bln
Saudi's Tadawul IPO 442.53% oversubscribed to reach \$1.3bln

Egypt:

Egypt achieves primary deficit of LE 4B in Q1 of 21/22
Egypt to announce stimulus for transition to green economy next March
Egypt's sovereign fund aims to increase investment portfolio to LE 22-23B

South Africa:

Nedbank projects 90% increase in full year profit
Old Mutual's private equity unit makes a bid for wellness focused Long4Life
Alexander Forbes to see 40% increase in clients thanks to Sanlam acquisition

India:

Govt set on LIC IPO in Q4 despite mkt woes
RIL makes green finance debut with \$736mn loan
SBI seeks to sell NPA power company with Rs 4,100 crore dues

Vietnam:

Castrol, BP renew joint-venture contract with Petrolimex
Hà Nội announces plan to promote key industrial products in 2022
Remittances to Việt Nam to grow despite pandemic

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,999.32	2.6%	5.3%	5.3%	78.4%	AED/USD	3.67	0.0%	0.0%
Egypt	11,514.87	1.0%	1.7%	1.0%	6.2%	EGP/USD	15.72	0.1%	-0.1%
India	16,912.25	-1.7%	-1.7%	-0.4%	21.0%	INR/USD	75.42	0.3%	3.2%
Kenya	1,822.26	-0.9%	-0.9%	-2.6%	-2.5%	KES/USD	112.75	0.0%	3.3%
Nigeria	1,682.49	-0.5%	-0.5%	-3.6%	2.6%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,021.07	-1.1%	1.3%	2.4%	26.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,598.46	0.5%	0.5%	0.8%	18.8%	ZAR/USD	15.88	-1.4%	8.1%
Vietnam	1,480.92	-1.5%	-1.5%	-3.7%	38.3%	VND/USD	23,025.00	0.8%	-0.2%

MSCI Emerging Markets

MSCI Frontier	650.96	-0.9%	-0.9%	-0.8%	13.9%	Brent Crude (\$)	73.08	4.6%	41.1%
MSCI Frontier 100	1,492.53	-1.0%	-1.0%	-1.2%	18.7%	Gold (\$)	1,779.50	-0.2%	-6.1%
MSCI Emerging	1,213.96	-0.9%	-0.9%	0.1%	-6.0%	Copper (\$)	9,505.00	0.9%	22.4%
MSCI World (USD)	3,117.31	1.0%	1.0%	0.5%	15.9%	Coffee (\$)	208.56	2.6%	75.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	5.00	2.0%	-16.0%	28.38	Lafarge Africa	22.20	-9.9%	5.5%	165.70
P Z Cussons	6.00	0.8%	13.2%	5.49	Fidelity	2.36	-5.6%	-6.3%	10.75
					UBA	7.50	-5.1%	-13.3%	139.45
					Unilever	13.20	-4.0%	-5.0%	17.46
					Axamansard	2.07	-3.7%	97.1%	5.00
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Okomu Oil	142.00	142.00	0.0%	0.63	Dangote Sugar	15.50	15.50	0.0%	47.95
Dangote Cement	280.00	280.00	0.0%	5.42	Nigerian Breweries	46.95	46.50	1.0%	4.65
Airtel Africa	955.00	955.00	0.0%	12.72	Nestle	1395.00	1350.00	3.3%	61.16
United Capital Plc	9.85	9.90	-0.5%	206.46	Sterling	1.46	1.40	4.3%	113.55
Presco	87.80	89.00	-1.3%	7.20	UBN	4.75	4.50	5.6%	0.78

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National for Building Materials	0.28	15.0%	6.6%	0.09	Ras Al Khaimah Cement Investment Co	7.75	-5.3%	128.6%	153.53
Methaq Takaful Ins.	0.83	7.4%	-4.7%	6.14	Al Qudra Holding	6.85	-3.8%	522.7%	21.78
Abu Dhabi National Hotels	3.53	6.3%	26.1%	0.85	Esg Emirates Stallions Group P.J.S.C	7.70	-3.8%	85.1%	10.68
Multiply Group PJSC	2.12	6.0%	6.0%	191.61	Easylease motorcycle rentals	28.00	-3.5%	59.1%	4.53
Adnoc Drilling Company	3.45	5.8%	16.9%	66.40	Response Plus Holding	9.82	-2.8%	-21.4%	1.55
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	Commercial Bank Intl	0.65	0.63	3.2%	0.00
The National Investor PRJSC	0.60	0.60	0.0%	0.00	Ooredoo QPSC	6.80	6.59	3.2%	22.56
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Sudatel Telecom	0.35	0.32	9.4%	0.08

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Heliopolis Housing	6.67	18.7%	9.3%	267.57	Fawry For Banking Technology And Electronic Payment	11.98	-3.4%	-14.7%	63.62
GB AUTO	4.36	9.3%	31.3%	27.59	Tenth Of Ramadan Pharma Industries & Diagnostic	2.53	-1.9%	-13.6%	15.24
Medinet Nasr Housing	2.63	7.3%	-28.4%	102.65	Speed Medical	1.78	-1.9%	8.7%	22.85
Credit Agricole Egypt	30.61	7.2%	5.5%	28.84	Citadel Capital	1.18	-1.3%	-18.2%	9.04
Palm Hills Development Company	1.91	4.8%	40.1%	40.27	Raya Holding For Financial Investments	2.46	-1.2%	235.6%	0.77
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£)
Heliopolis Housing	6.67	6.75	-1.2%	267.57	Abou Kir Fertilizers	18.79	18.12	3.7%	7.63
Credit Agricole Egypt	30.61	31.01	-1.3%	28.84	Fawry For Banking TechnologyAnd Electronic Payment	11.98	11.55	3.7%	63.62
Egyptian Financial Group-HermesHolding Company	14.47	14.70	-1.6%	30.91	Gadwa For Industrial Develp	1.02	0.95	7.6%	3.00
Telecom Egypt	15.07	15.35	-1.8%	57.39	Citadel Capital	1.18	1.09	7.8%	9.04
T M G Holding	8.60	8.84	-2.7%	28.26	Eastern Company	11.37	10.50	8.3%	20.24

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
UPL	715.90	0.4%	53.5%	3292.680	Indusind Bank	916.00	-3.7%	2.4%	4285.13
					Tata Consumer products Ltd.	748.25	-3.4%	26.8%	1253.71
					Bajaj Finserv	16917.00	-3.3%	89.9%	3488.46
					Bharti Airtel	696.75	-3.0%	36.7%	6215.97
					TCS	3533.80	-2.9%	23.4%	6632.17
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	202.35	216.45	-6.5%	1726.90	Hero Motocorp	2420.55	2408.90	0.5%	847.74
Nestle India Limited	18966.10	20609.15	-8.0%	667.15	Bajaj Auto	3252.50	3172.00	2.5%	823.44
Infosys	1694.95	1848.00	-8.3%	6807.30	Britannia Inds.	3498.30	3317.30	5.5%	586.53
HDFC	2765.00	3021.10	-8.5%	4681.78	Eicher Motors	2450.00	2303.70	6.4%	1316.78
Larsen & Toubro	1783.85	1981.75	-10.0%	2816.96	Bharat Petroleum	384.05	357.00	7.6%	1718.76

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	58.50	5.9%	-22.0%	0.01	Total Kenya Ltd	24.00	-4.0%	0.0%	0.03
The Cooperative Bank of Kenya Ltd	12.00	1.7%	-4.0%	5.39	Stanbic Holdings	87.00	-3.9%	2.4%	0.01
WPP Scangroup Plc	4.09	0.5%	-31.8%	0.06	NCBA Group Plc	23.15	-3.5%	-13.5%	1.20
Centum Investment Company Plc	14.40	0.3%	-10.3%	0.38	Equity Group Holdings Plc	45.00	-3.4%	23.1%	94.59
					Nation Media Group	17.80	-3.0%	15.2%	0.04
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	10.80	11.40	-5.3%	1.26	East African Breweries Limited	148.50	148.00	0.3%	5.08
Stanbic Holdings	87.00	99.00	-12.1%	0.01	Standard Chartered Bank Kenya Ltd	129.00	127.00	1.6%	5.12
Total Kenya Ltd	24.00	27.50	-12.7%	0.03	Centum Investment Company Plc	14.40	14.05	2.5%	0.38
The Cooperative Bank of Kenya Ltd	12.00	14.05	-14.6%	5.39	NCBA Group Plc	23.15	22.50	2.9%	1.20
British American Tobacco Kenya Ltd	420.25	500.00	-16.0%	0.04	The Cooperative Bank of Kenya Ltd	12.00	11.30	6.2%	5.39

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Wafrah for Industry and Development Co.	130.00	10.0%	-15.6%	80.15	Saudi Telecom Co.	110.00	-5.3%	3.8%	396.66
Saudi Arabian Fertilizer Co.	94.80	10.0%	17.6%	1.83	Saudi Enaya Cooperative Insurance Co.	34.55	-4.6%	0.1%	47.39
Al Abdullatif Industrial Investment Co.	31.10	9.9%	103.3%	102.27	Amana Cooperative Insurance Co.	37.10	-4.1%	-0.1%	27.25
Etihad Atheeb Telecommunication Co.	26.80	9.8%	142.3%	33.40	Batic Investments and Logistics Co.	38.90	-4.0%	11.5%	107.08
Al Hassan Ghazi Ibrahim Shaker Co.	23.28	6.9%	44.4%	143.41	National Petrochemical Co.	38.75	-3.7%	16.5%	8.60
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	62.60	62.60	0.0%	215.44	Naseej International Trading Co	28.15	28.15	0.0%	82.33
Zamil Industrial Investment Co.	29.60	29.60	0.0%	45.98	Savola Group	32.10	32.10	0.0%	25.41
United Electronics Co.	130.60	130.60	0.0%	22.28	Tanmiah Food Co.	80.30	80.30	0.0%	35.67
United Cooperative Assurance Co.	34.45	34.45	0.0%	6.14	BinDawood Holding Co.	98.20	98.20	0.0%	4.45
Tourism Enterprise Co.	76.70	76.70	0.0%	43.21	Nayifat Finance Co.	33.95	33.75	0.6%	85.37

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Nedbank Group Ltd	17276.00	3.3%	33.4%	36710.72	Aspen Pharmacare Holdings Ltd	22276.00	-5.2%	77.7%	33898.48
Exxaro Resources Ltd	15553.00	3.2%	15.5%	10316.65	MTN Group	16045.00	-3.8%	166.6%	65160.93
Anglo American PLC	59239.00	3.0%	24.8%	84576.23	Vodacom Group Ltd	13120.00	-1.7%	5.5%	22454.21
Absa Group Ltd	14926.00	2.6%	24.5%	75579.53	Old Mutual Ltd	1220.00	-1.2%	19.9%	17097.09
Northam Platinum Ltd	22190.00	2.3%	5.9%	22042.75	Sanlam Ltd	5680.00	-1.2%	-3.3%	20597.21
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	8286.00	8383.00	-1.2%	10593.83	SPAR Group Ltd/The	16710.00	16161.00	3.4%	22442.22
Shoprite Holdings Ltd	20262.00	20531.00	-1.3%	18947.87	Reinet Investments SCA	26760.00	25623.00	4.4%	6280.04
Investec PLC	8262.00	8400.00	-1.6%	11387.40	Naspers Ltd	246200.00	229087.00	7.5%	190740.00
Cie Financiere Richemont SA	23618.00	24338.00	-3.0%	71647.61	British American Tobacco PLC	55308.00	51051.00	8.3%	29608.64
Capitec Bank Holdings Ltd	186000.00	193695.00	-4.0%	20344.68	Sanlam Ltd	5680.00	5229.00	8.6%	20597.21

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	13900.00	2.6%	3.9%	299454.65	Ho Chi Minh City Devp	29100.00	-6.1%	53.2%	262112.43
Saigon Securities Inc	51000.00	1.0%	129.2%	1594963.80	Khang Dien House Trading & Investment	43300.00	-6.0%	62.6%	46577.81
Phat Dat Real Estate Development Corp	95600.00	0.7%	128.1%	720135.68	Petrovietnam Gas	92000.00	-4.8%	9.6%	113371.60
Vingroup JSC	105600.00	0.1%	9.8%	615130.56	Vietnam Rubber Group JSC	45750.00	-4.1%	49.8%	1584500.93
Vietjet Aviation	120500.00	0.1%	-3.6%	93483.90	Hoa Phat Group JSC	45750.00	-4.1%	49.8%	1584500.93
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Phat Dat Real Estate Development Corp	95600.00	99700.00	-4.1%	720135.68	Vinamilk	85300.00	82573.01	3.3%	270247.46
Masan Group Corp	151000.00	159700.00	-5.4%	165843.30	Saigon Beer Alcohol Beverage Corp.	151600.00	139800.00	8.4%	18434.56
Tien Phong Commercial Joint Stock Bank	47000.00	49900.00	-5.8%	202523.00	Vincom Retail	28000.00	25100.00	11.6%	248539.20
PetroVietnam Power Corp	13900.00	14950.83	-7.0%	299454.65	Vietcombank	95400.00	85500.00	11.6%	96220.44
FPT Corp	94500.00	101800.00	-7.2%	226214.10	Vietjet Aviation	120500.00	105800.00	13.9%	93483.90

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