

Daily Market Report

10 December 2021

JSE

JSE All-Share Index decreased by 0.27% to close at 72,207.63 points on Thursday, as Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 196.61 points, up by 0.14% on Thursday with Sode Côte d'Ivoire & Setao Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index dropped by 1.77% to close at 41,685.22 points on Thursday, as Industrial sector recorded losses.

EGX

EGX 30 Index increased 0.73% to close at 11,534.63 points on Thursday, as the market added LE 6.2 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index increased by 0.28% to close at 993.54 points on Thursday.

African Markets

Nigeria: NSE 30 Index dropped by 1.87% and closed at 1,671.76 points on Thursday. Dangote Cement and UBA were the top losers.

Egypt: EGX 30 Index increased 0.73% to close at 11,534.63 points on Thursday, as the market added LE 6.2 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.43% and closed at 1,838.69 points on Thursday. Centum Investment Company and Diamond Trust Bank were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.32% to close at 65,779.50 points on Thursday, as Industrial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.27%

BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.14%

NSE

Nigerian Stock Exchange

▼ 1.77%

EGX

Egyptian Stock Exchange

▲ 0.73%

ESG

Casablanca Stock Exchange

▲ 0.28%

Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.75
INTERBANK RATES	
OBB	13.75 ▼
Overnight	14.25 ▼

Other Emerging Markets

Abu Dhabi: ADX General declined by 0.79% to close at 8,883.00 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE decreased by 0.66% to close at 477.98 points.

Vietnam: VN-30 Index rose by 0.89% to close at 1,529.61 points on Thursday, as the blue-chip companies recorded gains. MSCI Vietnam increased by 0.65% to close at 1,072.33 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.48% to close at 10,938.88 points on Thursday, as losses in the Cement, Telecoms & IT and Retail sectors pushed shares lower. MSCI Saudi Arabia declined 0.62% to close 1,496.71 points.

India: Nifty 50 market increased 0.27% to close at 17,516.85 points on Thursday, as gains in the Capital Goods, Fast Moving Consumer Goods and Oil & Gas sectors led shares higher. MSCI India increased by 0.34% to close at 2,046.53 points.

News

Nigeria:

Capital inflow drops by 29% as COVID-19 cases rise – CBN
Afreximbank, firm sign \$2bn deal for Nigeria's floating LNG
TotalEnergies, partners unveil projects in Nigeria

Kenya:

December bond raises Sh38bn backed by liquid market
Kenya paid China Sh29bn to ease debt repayment standoff
Safaricom waives M-Pesa fees for Sh1bn drought funds

Abu Dhabi:

Adnoc Drilling awarded \$3.8bn contract
Mubadala-backed EGA agrees to supply bauxite to China's Bosai Minerals Group
Aldar invites tech start-ups to apply for its accelerator programme

Saudi Arabia:

Tadawul Group aiming to give 70% of its profits to shareholders
Saudi industrial production hits highest level since April 2020
Saudi-Qatari business forum reviews economic, investment ties

Egypt:

Egypt's annual inflation records 6.2% during Nov, urban inflation dips to 5.6%
EFG Hermes concludes follow-on sale of 126.2mln shares in Abu Qir fertilizers
Egypt to offer 6 investment opportunities during Q122

South Africa:

SA to balance economy risks as virus measures weighed
Sibanye-Stillwater acquires R685m Australian mining stake
IMF revises South Africa's growth forecast down for 2021

India:

Paytm Payments Bank gets RBI nod to function as scheduled payments bank
India plans to roll out a Rs 76,000-cr red carpet for chip companies
Record Rs 11,005cr mutual fund SIP inflows in Nov

Vietnam:

LEGO Group to build new US\$1 billion factory in Việt Nam
Tra fish export forecast to hit 1.54 billion USD in 2021
State Bank restrains banks investing in corporate bonds

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,883.00	-0.8%	3.9%	3.9%	76.1%	AED/USD	3.67	0.0%	0.0%
Egypt	11,534.63	0.7%	1.9%	1.2%	6.4%	EGP/USD	15.71	-0.1%	-0.1%
India	17,516.85	0.3%	1.9%	3.1%	25.3%	INR/USD	75.52	0.1%	3.4%
Kenya	1,838.69	0.4%	-0.04%	-1.7%	-1.6%	KES/USD	112.90	0.0%	3.4%
Nigeria	1,671.76	-1.9%	-1.2%	-4.3%	1.9%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	10,938.88	-0.5%	0.5%	1.6%	25.9%	SAR/USD	3.75	0.0%	0.0%
South Africa	65,779.50	-0.3%	2.3%	2.7%	21.0%	ZAR/USD	15.97	1.7%	8.7%
Vietnam	1,529.61	0.9%	1.7%	-0.5%	42.9%	VND/USD	22,990.00	0.3%	-0.4%

MSCI Emerging Markets

MSCI Frontier	661.20	-0.1%	0.7%	0.7%	15.7%	Brent Crude (\$)	74.42	-1.8%	43.7%
MSCI Frontier 100	1,519.04	0.1%	0.7%	0.5%	20.8%	Gold (\$)	1,776.70	-0.5%	-6.2%
MSCI Emerging	1,247.71	0.5%	1.9%	2.9%	-3.4%	Copper (\$)	9,534.50	-1.2%	22.8%
MSCI World (USD)	3,172.49	-0.7%	2.8%	2.3%	17.9%	Coffee (\$)	208.76	0.6%	75.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	8.70	2.4%	45.0%	42.95	Dangote Cement	252.00	-10.0%	2.9%	214.41
Zenith	24.55	2.3%	-1.0%	459.11	UACN	9.00	-10.0%	42.1%	4.35
Access	9.20	2.2%	8.9%	419.73	Cadbury	9.00	-2.7%	0.0%	1.70
UBN	4.85	2.1%	-9.3%	1.12	Axamansard	2.20	-0.9%	109.5%	1.61
Fidelity	2.43	2.1%	-3.6%	36.05	UBA	7.90	-0.6%	-8.7%	80.76
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%	5.40	Nigerian Breweries	47.00	46.50	1.1%	35.28
Airtel Africa	955.00	955.00	0.0%	19.32	Nestle	1395.00	1350.00	3.3%	3.94
Presco	87.80	89.00	-1.3%	8.00	Dangote Sugar	15.95	15.00	6.3%	8.18
United Capital Plc	9.70	9.90	-2.0%	26.08	Sterling	1.49	1.40	6.4%	56.42
Ecobank	8.70	8.90	-2.2%	42.95	Cap	19.30	18.00	7.2%	0.42

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Umm Al Qaiwain General Investment Co	1.15	15.0%	27.8%	0.00	Al Qudra Holding	6.70	-4.4%	509.1%	29.38
REEM INVESTMENTS	44.96	15.0%	104.4%	0.06	Gulf Cement	0.74	-4.2%	-12.0%	1.40
Abu Dhabi National for Building Materials	0.30	7.1%	15.8%	0.00	RAK Co. for White Cement & Construction	1.63	-4.1%	92.0%	0.02
Ras Al Khaimah Poultry	2.03	6.3%	40.0%	0.39	Sharjah Cement	0.77	-3.9%	1.3%	1.08
Finance House	1.72	4.2%	-9.5%	0.01	ZEE STORE PRJSC	28.46	-3.5%	171.0%	18.88
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)
Al Buhaira Ntl Ins.	1.97	1.97	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00
Insurance House	0.91	0.91	0.0%	0.00	Ooredoo QPSC	6.86	6.59	4.0%	6.66
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Sharjah Insurance	1.10	1.05	4.8%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.00
REEM INVESTMENTS PrJSC	44.96	44.96	0.0%	0.06	Sudatel Telecom	0.36	0.32	10.9%	0.05

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Abou Kir Fertilizers	22.11	20.0%	6.9%	121.06	Egyptian for Tourism Resorts	1.39	-1.1%	-1.6%	1.50
Heliopolis Housing	6.30	7.5%	3.3%	116.43	Cleopatra Hospital Company	4.65	-1.1%	-2.3%	23.00
Orascom Development Egypt	5.80	5.1%	18.4%	15.44	Commercial International Bank	51.49	-0.8%	16.0%	97.82
GB AUTO	4.82	4.8%	45.2%	22.97	Misr Fertilizers ProductionCo	92.24	-0.7%	57.0%	6.39
Alexandria Mineral Oils Company	3.70	3.1%	18.6%	7.96	Cairo For Investment And Real Estate Development	13.95	-0.4%	-4.8%	0.63
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£)
Telecom Egypt	15.86	15.96	-0.6%	16.70	Eastern Company	10.81	10.50	3.0%	109.08
Egyptian Financial Group-HermesHolding Company	14.57	14.70	-0.9%	77.21	Gadwa For Industrial Devp	1.02	0.95	6.9%	0.82
Credit Agricole Egypt	30.53	31.01	-1.5%	34.94	Fawry For Banking TechnologyAnd Electronic Payment	10.98	10.15	8.2%	55.55
T M G Holding	8.70	9.00	-3.3%	140.76	Citadel Capital - Common Shares	1.18	1.09	8.3%	2.81
GB AUTO	4.82	5.00	-3.6%	22.97	Aspire Capital Holding	0.26	0.24	9.6%	0.63

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ITC	236.00	4.9%	12.9%	8851.079	Hdfc Bank	1526.00	-1.8%	6.2%	8990.37
Larsen & Toubro	1879.95	3.0%	46.0%	7048.20	Titan Company	2373.00	-1.4%	51.4%	2967.54
Asian Paints	3177.00	2.2%	14.9%	4061.17	Nestle India Limited	19260.00	-1.1%	4.7%	780.99
UPL	742.45	2.0%	59.2%	1769.10	SBI Life Insurance	1157.95	-1.0%	28.1%	1318.88
Britannia Inds.	3630.25	1.5%	1.5%	1022.66	NTPC	126.00	-1.0%	26.8%	1452.10
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Infosys	1758.00	1848.00	-4.9%	3658.85	Hero Motocorp	2525.40	2408.90	4.8%	1007.69
Larsen & Toubro	1879.95	1981.75	-5.1%	7048.20	Bajaj Auto	3331.15	3172.00	5.0%	791.22
Power Grid Corp Of India	203.50	216.45	-6.0%	877.99	Britannia Inds.	3630.25	3317.30	9.4%	1022.66
HDFC	2839.75	3021.10	-6.0%	5801.80	Eicher Motors	2539.00	2303.70	10.2%	2091.21
Nestle India Limited	19260.00	20609.15	-6.5%	780.99	Bharat Petroleum	393.90	357.00	10.3%	2574.56

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	14.80	3.5%	-7.8%	0.37	Standard Chartered Bank Kenya Ltd	124.00	-2.7%	-14.0%	1.88
Diamond Trust Bank Limited	58.00	2.7%	-22.7%	0.03	Kenya Power & Lighting Limited	1.76	-2.2%	2.9%	0.48
British American Tobacco Kenya Ltd	430.00	2.0%	19.1%	0.04	Kenya Reinsurance Corporation Ltd	2.27	-0.9%	-2.2%	0.04
NCBA Group Plc	23.95	1.9%	-10.5%	0.96	Nairobi Securities Exchange Plc	8.52	-0.7%	4.4%	0.22
Nation Media Group	17.90	1.1%	15.9%	0.02	East African Breweries Limited	149.50	-0.7%	-3.1%	110.08
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	11.40	-3.9%	2.34	Standard Chartered Bank Kenya Ltd	124.00	123.00	0.8%	1.88
Total Kenya Ltd	24.50	27.50	-10.9%	0.01	East African Breweries Limited	149.50	148.00	1.0%	110.08
Stanbic Holdings	87.00	99.00	-12.1%	0.10	Bamburi Cement Limited	33.80	32.60	3.7%	0.21
British American Tobacco Kenya Ltd	430.00	500.00	-14.0%	0.04	Centum Investment Company Plc	14.80	14.05	5.3%	0.37
Equity Group Holdings Plc	47.05	55.00	-14.5%	59.22	The Cooperative Bank of Kenya Ltd	12.00	11.30	6.2%	1.08

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.	29.15	10.0%	-13.2%	34.04	Halwani Bros. Co.	88.70	-3.6%	-0.8%	11.62
Development Works Food Co.	251.60	10.0%	59.8%	155.58	Sahara International Petrochemical Co.	40.60	-3.1%	134.4%	117.43
Saudi Arabian Fertilizer Co.	126.00	10.0%	56.3%	72.49	Baazeem Trading	116.60	-3.0%	29.3%	157.68
Naseej International Trading Co	30.85	7.5%	-68.8%	158.63	National Petrochemical Co.	38.00	-2.6%	14.3%	7.44
Saudi Tadawul Group Holding Co.	126.00	6.8%	6.8%	1189.85	Aseer Trading, Tourism and Manufacturing Co.	19.80	-2.5%	20.7%	23.37
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)
Development Works Food	251.60	251.60	0.0%	155.58	Tanmiah Food Co.	83.90	83.90	0.0%	23.45
The Saudi National Bank	62.20	62.20	0.0%	93.26	BinDawood Holding	97.20	97.20	0.0%	4.90
Zamil Industrial Investment	30.25	30.25	0.0%	31.51	Nayifat Finance Co.	33.70	33.70	0.0%	40.85
United Electronics Co.	131.40	131.40	0.0%	10.84	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Cooperative Assurance Co.	34.60	34.60	0.0%	6.53	National Shipping Company of Saudi Arabia	33.00	31.70	4.1%	12.85

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sanlam Ltd	5990.00	2.7%	2.0%	34077.70	Northam Platinum Ltd	20276.00	-5.1%	-3.2%	31597.90
British American Tobacco PLC	56991.00	2.1%	4.5%	26415.78	Exxaro Resources Ltd	15357.00	-3.3%	14.1%	26627.29
Clicks Group Ltd	30228.00	1.9%	19.6%	19172.23	Sasol Ltd	28363.00	-2.6%	111.8%	33404.72
Anglo American Platinum Ltd	184970.00	1.3%	36.1%	55028.21	MTN Group	15855.00	-2.5%	163.4%	57245.83
Vodacom Group Ltd	13302.00	1.2%	6.9%	24480.88	Sibanye Stillwater Ltd	4913.00	-1.5%	-18.1%	61640.14
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	8389.00	8440.00	-0.6%	7724.78	SPAR Group Ltd/The	16362.00	16161.00	1.2%	19733.14
Cie Financiere Richemont SA	24727.00	25044.00	-1.3%	85073.52	Reinet Investments SCA	27832.00	25623.00	8.6%	6919.15
Capitec Bank Holdings Ltd	190964.00	193695.00	-1.4%	27306.13	Naspers Ltd	249952.00	229087.00	9.1%	127661.98
Shoprite Holdings Ltd	20493.00	21120.00	-3.0%	44697.06	Sibanye Stillwater Ltd	4913.00	4479.00	9.7%	61640.14
Clicks Group Ltd	30228.00	31163.00	-3.0%	19172.23	Vodacom Group Ltd	13302.00	12050.00	10.4%	24480.88

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	48100.00	5.0%	80.6%	136161.48	Vietnam Prosperity	35600.00	-0.4%	97.2%	461482.80
Saigon Securities Inc	53800.00	3.9%	141.8%	881410.78	Saigon Beer Alcohol Beverage Corp.	152500.00	-0.3%	-21.2%	31704.75
Phu Nhuan Jewelry	98500.00	2.6%	23.5%	53731.75	Vietnam Rubber Group JSC	47100.00	-0.2%	54.3%	486090.84
PetroVietnam Power Corp	15450.00	2.3%	15.5%	402871.11	Hoa Phat Group JSC	47100.00	-0.2%	54.3%	486090.84
Vietnam JSC Bank	33750.00	2.3%	26.1%	200589.75					
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	98800.00	99700.00	-0.9%	394212.00	Vinamilk	87000.00	82573.01	5.4%	126141.30
Tien Phong Commercial Joint Stock Bank	51200.00	52000.00	-1.5%	130273.28	Saigon Beer Alcohol Beverage Corp.	152500.00	139800.00	9.1%	31704.75
PetroVietnam Power Corp	15450.00	15700.00	-1.6%	402871.11	Vietcombank	99200.00	85500.00	16.0%	79895.68
Masan Group Corp	154000.00	159700.00	-3.6%	120797.60	Vietjet Aviation	123500.00	105800.00	16.7%	103702.95
FPT Corp	97000.00	101800.00	-4.7%	96330.70	Bank for Inv. and Devp	44000.00	36500.00	20.5%	43106.80

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