

# Daily Market Report

## 13 December 2021

### JSE

JSE All-Share Index declined by 0.72% to close at 71,686.31 points on Friday, as Industrial, Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 195.99 points, down by 0.32% on Friday with Filtisac Côte d'Ivoire & Nsia Banque Côte d'Ivoire being the top losers.

### NSE

NSE All-Share Index increased by 0.47% to close at 41,882.97 points on Friday, as Banking, Oil & Gas, Consumer Goods, Insurance and Industrial sector recorded gains.

### EGX

EGX 30 Index jumped by 1.50% to close at 11,708.05 points on Sunday, as the market gained LE 6.1 billion of market cap, amid Egyptian and foreign buying.

### ESG

Casablanca ESG 10 Index increased by 0.69% to close at 1,000.42 points on Friday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.72%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼ 0.32%
<b>NSE</b> Nigerian Stock Exchange	▲ 0.47%
<b>EGX</b> Egyptian Stock Exchange	▲ 1.50%
<b>ESG</b> Casablanca Stock Exchange	▲ 0.69%

### African Markets

**Nigeria:** NSE 30 Index increased by 0.63% and closed at 1,682.33 points on Friday. Guinness and Fidelity were the top gainers.

**Egypt:** EGX 30 Index jumped by 1.50% to close at 11,708.05 points on Sunday, as the market gained LE 6.1 billion of market cap, amid Egyptian and foreign buying.

**Kenya:** NSE 20 Index roseed by 0.97% and closed at 1,856.45 points on Friday. Stanbic Holdings and Nation Media Group were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.59% to close at 65,390.32 points on Friday, as Industrial, Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	15.99%
Exchange Rate	₦ 411.75
<b>INTERBANK RATES</b>	
OBB	17.50 ▲
Overnight	17.75 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX General rose by 0.99% to close at 8,971.38 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE remained unchanged at 477.98 points.

**Vietnam:** VN-30 Index declined by 0.66% to close at 1,519.46 points on Friday, as the blue-chip companies recorded losses. MSCI Vietnam fell by 0.97% to close at 1,061.94 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.28% to close at 10,969.06 points on Sunday, as gains in the Building & Construction, Industrial Investment and Transport sectors led shares higher. MSCI Saudi Arabia inched up by 0.03% to close 1,497.21 points.

**India:** Nifty 50 market slipped 0.03% to close at 17,511.30 points on Friday, as losses in the Consumer Durables, Banking and Technology sectors led shares lower. MSCI India inched up by 0.05% to close at 2,047.48 points.

### News

#### Nigeria:

Banks' credit to economy hits N23.5tn, says CBN  
Nigeria imports N143bn solid minerals in nine months  
Federation account remittances slide by N1.58tn in 10 months

#### Kenya:

Uhuru: Power cost to reduce before Christmas  
Local banks hold Sh695bn pegged on expiring UK rate  
CBK Accepts KSh 11.9 Billion at the Weekly T-Bills Auction

#### Abu Dhabi:

UAE's Gulf Islamic Investments acquires US portfolio for \$100mln  
UAE and Panama sign agreement to boost seafarers' training and legal knowledge  
UAE and Russia trade set to rise 21% to hit \$4bn in 2021

#### Saudi Arabia:

Saudi PIF to invest \$40bn locally in 2022: Mohammed bin Salman  
Saudi food delivery app Jahez plans to collect up to \$428mln from IPO  
Saudi-listed Al Arabia establishes joint stock company in Egypt

#### Egypt:

Finance Ministry: Egypt to join JP Morgan index end of Jan.  
Egypt's trade deficit dips 22.5% to \$2.39B in September  
Egypt's food exports up by 19% year on year in 2021: Trade minister

#### South Africa:

Q4 Absa manufacturing survey reflects decline in business confidence  
JSE launches sustainability & climate change disclosure guidance for listed cos  
Crypto rules planned to protect vulnerable in SA

#### India:

Forex reserves fall \$4.5 billion in two weeks  
RIL, Welspun among bidders for bankrupt textile co Sintex  
RBI allows LIC to hold 9.99% in IndusInd

#### Vietnam:

Việt Nam Stock Exchange officially debuts Vietnam, RoK eye bringing two-way trade to 100 billion USD  
VinFast's car sales up over 15 percent in November

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,971.38	1.0%	1.0%	5.0%	77.8%	AED/USD	3.67	0.0%	0.0%
Egypt	11,708.05	1.5%	1.5%	2.7%	8.0%	EGP/USD	15.71	0.0%	-0.1%
India	17,511.30	-0.03%	0.0%	3.1%	25.2%	INR/USD	75.78	0.3%	3.7%
Kenya	1,856.45	1.0%	0.0%	-0.8%	-0.6%	KES/USD	112.90	0.0%	3.4%
Nigeria	1,682.33	0.6%	0.0%	-3.7%	2.6%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	10,969.06	0.3%	0.3%	1.9%	26.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	65,390.32	-0.6%	0.0%	2.1%	20.2%	ZAR/USD	15.99	0.1%	8.9%
Vietnam	1,519.46	-0.7%	0.0%	-1.2%	41.9%	VND/USD	22,975.00	-0.1%	-0.5%

## MSCI Emerging Markets

MSCI Frontier	659.70	-0.2%	0.0%	0.5%	15.4%	Brent Crude (\$)	75.15	1.0%	45.1%
MSCI Frontier 100	1,516.34	-0.2%	0.0%	0.3%	20.5%	Gold (\$)	1,784.80	0.5%	-5.8%
MSCI Emerging	1,238.54	-0.7%	0.0%	2.2%	-4.1%	Copper (\$)	9,506.50	-0.3%	22.8%
MSCI World (USD)	3,188.26	0.5%	0.0%	2.8%	18.5%	Coffee (\$)	206.43	-1.1%	73.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guinness	39.00	6.8%	105.3%	16.82	Custodian	7.10	-5.3%	21.4%	28.72
Fidelity	2.54	4.5%	0.8%	4.28	Stanbic IBTC	36.50	-1.4%	-3.3%	52.85
Axamansard	2.29	4.1%	118.1%	5.11	Sterling	1.47	-1.3%	-27.9%	1.71
Ecobank	9.05	4.0%	50.8%	50.30	International Breweries	4.95	-1.0%	-16.8%	2.40
Zenith	25.50	3.9%	2.8%	338.31	Access	9.15	-0.5%	8.3%	510.96
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%	4.63	Nigerian Breweries	47.00	46.50	1.1%	44.83
Ecobank	9.05	9.05	0.0%	50.30	Nestle	1395.00	1350.00	3.3%	318.13
Airtel Africa	955.00	955.00	0.0%	0.25	Sterling	1.47	1.40	5.0%	1.71
United Capital Plc	9.90	9.90	0.0%	31.79	Dangote Sugar	15.95	15.00	6.3%	11.71
Presco	87.80	89.00	-1.3%	30.18	Cap	19.30	18.00	7.2%	0.51

### 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 Hotels	4.03	14.8%	43.9%	6.41	REEM INVESTMENTS	40.50	-9.9%	84.1%	0.16
Ras Al Khaimah Poultry	2.33	14.8%	60.7%	0.00	Umm Al Qaiwain General Investment Co	1.04	-9.6%	15.6%	0.03
Abu Dhabi Islamic Bank	6.97	5.3%	48.3%	20.58	Abu Dhabi National for Building Materials	0.29	-5.0%	10.0%	0.00
Finance House	1.79	4.1%	-5.8%	0.00	Easylease motorcycle rentals	27.08	-5.0%	53.9%	1.66
RAK Co. for White Cement & Construction	1.69	3.7%	99.1%	0.08	Sharjah Insurance	1.05	-4.6%	-50.2%	0.00
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)
Al Buhaira Ntl Ins.	1.97	1.97	0.0%	0.00	National Bank of Fujairah	5.00	4.98	0.4%	0.00
Insurance House	0.91	0.91	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Ooredoo QPSC	6.87	6.59	4.2%	1.17
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.00
Fujairah Building Industries	1.50	1.50	0.0%	0.00	Sudatel Telecom	0.35	0.32	8.8%	0.02

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian for Tourism Resorts	1.46	5.6%	3.9%	7.86	Abou Kir Fertilizers	20.84	-5.7%	0.8%	192.08
Credit Agricole Egypt	31.96	4.7%	10.1%	29.04	Speed Medical	1.18	-4.4%	-27.9%	83.14
Fawry For Banking Technology And Electronic Payment	11.48	4.6%	-18.3%	30.44	Palm Hills Development Company	1.82	-0.5%	33.1%	13.21
Citadel Capital - Common Shares	1.23	4.2%	-14.4%	16.17	Aspire Capital Holding	0.26	-0.4%	-71.8%	0.52
GB AUTO	4.99	3.5%	50.3%	20.43	Ezz Steel	13.87	-0.4%	29.3%	20.23
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	15.99	16.00	-0.1%	7.45	Eastern Company	10.80	10.50	2.9%	3.81
Egyptian Financial Group-HermesHolding Company	14.84	14.95	-0.7%	20.12	Gadwa For Industrial Development	1.02	0.95	6.9%	0.19
GB AUTO	4.99	5.05	-1.2%	20.43	Aspire Capital Holding	0.26	0.24	9.2%	0.52
Credit Agricole Egypt	31.96	32.58	-1.9%	29.04	MM Group For Industry And International Trade	6.25	5.61	11.4%	2.02
Commercial International Bank(Egypt)	52.90	54.15	-2.3%	53.80	Citadel Capital - Common Shares	1.23	1.09	12.8%	16.17

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Asian Paints	3279.00	3.2%	18.6%	8340.582	Divi's Laboratories Limited	4506.00	-1.6%	17.3%	3540.70
Grasim Industries	1746.00	1.4%	88.2%	1693.58	Titan Company	2337.00	-1.5%	49.1%	5319.29
SBI Life Insurance	1176.20	1.3%	30.1%	1107.93	HDFC	2809.30	-1.2%	9.8%	9723.67
State Bank Of India	494.80	1.3%	80.0%	6493.32	Tata Consumer products Ltd.	769.50	-1.0%	30.4%	1087.81
Bharat Petroleum	397.20	0.9%	4.2%	904.21	Kotak Mahindra Bank	1897.00	-1.0%	-4.9%	5799.53
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	1757.05	1848.00	-4.9%	3199.02	Hero Motocorp	2525.00	2408.90	4.8%	827.18
Larsen & Toubro	1868.25	1981.75	-5.7%	3325.27	Bajaj Auto	3344.60	3172.00	5.4%	737.21
Asian Paints	3279.00	3505.00	-6.4%	8340.58	Britannia Inds.	3623.75	3317.30	9.2%	691.07
Power Grid Corp Of India	202.00	216.45	-6.7%	936.91	Eicher Motors	2525.20	2303.70	9.6%	824.70
Nestle India Limited	19219.00	20609.15	-6.7%	756.67	HUL	2332.35	2120.00	10.0%	1687.41

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	92.25	6.0%	8.5%	0.49	Diamond Trust Bank Limited	56.00	-3.4%	-25.3%	0.01
Nation Media Group	18.90	5.6%	22.3%	0.02	WPP Scangroup Plc	4.04	-2.4%	-32.7%	0.41
Kengen Limited	4.49	4.9%	-4.7%	1.31	Centum Investment Company Plc	14.45	-2.4%	-10.0%	2.53
Bamburi Cement Limited	35.15	4.0%	-7.1%	0.15	Total Kenya Ltd	24.00	-2.0%	0.0%	0.13
Standard Chartered Bank Kenya Ltd	127.00	2.4%	-12.0%	0.47	Kenya Power & Lighting Limited	1.74	-1.1%	1.8%	0.69
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	11.05	11.40	-3.1%	0.57	East African Breweries Limited	149.00	148.00	0.7%	4.22
Stanbic Holdings	92.25	99.00	-6.8%	0.49	Centum Investment Company Plc	14.45	14.05	2.8%	2.53
Total Kenya Ltd	24.00	27.50	-12.7%	0.13	Standard Chartered Bank Kenya Ltd	127.00	123.00	3.3%	0.47
The Cooperative Bank of Kenya Ltd	12.20	14.05	-13.2%	0.33	Diamond Trust Bank Limited	56.00	54.00	3.7%	0.01
Equity Group Holdings Plc	47.50	55.00	-13.6%	24.93	NCBA Group Plc	24.05	22.50	6.9%	0.61

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Omran Industrial & Trading Co	112.20	10.0%	18.6%	64.69	Saudi Arabian Fertilizer Co.	121.60	-3.5%	50.9%	199.70
Wafrah for Industry and Development Co.	154.00	10.0%	0.0%	195.35	Saudi Telecom Co.	107.00	-2.7%	0.9%	12206.74
Development Works Food	276.60	9.9%	75.7%	3.50	Arabian Centres Co.	22.06	-2.4%	-11.9%	81.29
National Gypsum Co.	47.20	9.9%	68.9%	66.92	Alahli Takaful Co.	38.80	-2.3%	11.2%	17.14
Middle East Specialized Cables Co.	20.54	9.8%	33.2%	85.25	Saudi Enaya Cooperative Insurance Co.	34.20	-2.0%	-0.9%	13.87
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	276.60	276.60	0.0%	3.50	BinDawood Holding	96.90	96.90	0.0%	6.79
The Saudi National Bank	62.20	62.20	0.0%	56.64	Nayifat Finance Co.	33.15	33.15	0.0%	54.71
Zamil Industrial Investment	31.00	31.00	0.0%	41.96	Tanmiah Food Co.	88.10	87.10	1.1%	70.63
United Electronics Co.	131.40	131.40	0.0%	3.99	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Cooperative Assurance Co.	34.60	34.60	0.0%	7.51	National Shipping Company of Saudi Arabia	33.00	31.70	4.1%	17.95

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
British American Tobacco PLC	58125.00	2.0%	6.6%	75209.91	Old Mutual Ltd	1169.00	-3.9%	14.9%	30247.18
Glencore PLC	7810.00	1.3%	68.3%	24112.14	Impala Platinum Holdings Ltd	20676.00	-3.6%	2.4%	66731.31
Naspers Ltd	251954.00	0.8%	-16.6%	116958.31	Mr Price Group Ltd	20370.00	-3.2%	19.4%	23245.86
Clicks Group Ltd	30466.00	0.8%	20.6%	24215.14	Woolworths Holdings Ltd/South Africa	5165.00	-2.9%	30.6%	33988.12
BHP Group PLC	45123.00	0.7%	16.0%	42561.19	Gold Fields Ltd	16041.00	-2.8%	16.6%	34231.64
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	8298.00	8440.00	-1.7%	5334.50	SPAR Group Ltd/The	16300.00	16042.00	1.6%	21729.87
Cie Financiere Richemont SA	24613.00	25044.00	-1.7%	91276.25	Sibanye Stillwater Ltd	4832.00	4479.00	7.9%	52028.51
British American Tobacco PLC	58125.00	59245.00	-1.9%	75209.91	Reinet Investments SCA	27816.00	25623.00	8.6%	7796.71
Capitec Bank Holdings Ltd	189860.00	193695.00	-2.0%	28440.46	Vodacom Group Ltd	13235.00	12080.00	9.6%	15297.49
Clicks Group Ltd	30466.00	31163.00	-2.2%	24215.14	Naspers Ltd	251954.00	229087.00	10.0%	116958.31

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	16250.00	5.2%	21.5%	630839.63	Vingroup JSC	103100.00	-3.6%	7.2%	317609.86
BaoViet Holdings	58800.00	1.7%	-9.6%	37602.60	Petrovietnam Gas	96600.00	-2.1%	15.1%	65436.84
Tien Phong Commercial Joint Stock Bank	52000.00	1.6%	94.0%	425386.00	No Va Land Invest	113000.00	-1.7%	134.9%	326603.90
Bank for Inv. and Devp	44600.00	1.4%	-6.9%	92081.16	Saigon Securities Inc	53000.00	-1.5%	138.2%	741199.70
Vietjet Aviation	124500.00	0.8%	-0.4%	84286.50	Vietnam National Petroleum Group	53300.00	-1.5%	-0.3%	76783.98
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
PetroVietnam Power Corp	16250.00	16350.00	-0.6%	630839.63	Vinamilk	86300.00	82573.01	4.5%	128155.50
Phat Dat Real Estate Development Corp	98700.00	99800.00	-1.1%	492542.61	Saigon Beer Alcohol Beverage Corp.	152300.00	139800.00	8.9%	22875.46
Tien Phong Commercial Joint Stock Bank	52000.00	53500.00	-2.8%	425386.00	Vietcombank	100000.00	85500.00	17.0%	188120.00
Masan Group Corp	153700.00	159700.00	-3.8%	153146.68	Vietjet Aviation	124500.00	105800.00	17.7%	84286.50
FPT Corp	95800.00	101800.00	-5.9%	111128.00	Vietnam National Petroleum Group	53300.00	44568.25	19.6%	76783.98

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