

Daily Market Report

16 December 2021

JSE

JSE All-Share Index decreased 0.11% to close at 71,467.19 points on Wednesday, as Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 195.24 points, down by 0.11% on Wednesday with Sicable Côte d'Ivoire & Tractafic Motors Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index increased marginally by 0.09% to close at 42,357.36 points on Wednesday, as Consumer Goods and Insurance sector recorded gains.

EGX

EGX 30 Index inched up by 0.04% to close at 11,622.10 points on Wednesday, as the market gained LE 1.69 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index decreased by 0.10% to close at 995.59 points on Wednesday.

African Markets

Nigeria: NSE 30 Index increased marginally by 0.08% and closed at 1,704.13 points on Wednesday. FCMB and Dangote Sugar were the top gainers.

Egypt: EGX 30 Index inched up by 0.04% to close at 11,622.10 points on Wednesday, as the market gained LE 1.69 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index increased by 0.34% and closed at 1,869.49 points on Wednesday. Kenya Reinsurance Corporation and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index decreased 0.17% to close at 65,102.29 points on Wednesday, as Industrial and Resources sectors recorded losses.

Capital Markets

JSE
Johannesburg Stock Exchange ▼ 0.11%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.11%

NSE
Nigerian Stock Exchange ▲ 0.09%

EGX
Egyptian Stock Exchange ▲ 0.04%

ESG
Casablanca Stock Exchange ▼ 0.10%

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 411.83

INTERBANK RATES

OPR	13.00 ▼
Overnight	13.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.26% to close at 8,819.12 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE decreased by 0.44% to close at 481.88 points.

Vietnam: VN-30 Index increased by 0.20% to close at 1,519.42 points on Wednesday, as the blue-chip companies recorded gains. MSCI Vietnam increased by 0.22% to close at 1,068.03 points.

Saudi Arabia: Tadawul All Share Index climbed by 1.08% to close at 11,143.38 points on Wednesday, as gains in the Retail, Cement and Energy & Utilities sectors led shares higher. MSCI Saudi Arabia jumped by 1.34% to close at 1,523.45 points.

India: Nifty 50 market decreased 0.60% to close at 17,221.40 points on Wednesday, as losses in the Real Estate, Technology and IT sectors pushed shares lower. MSCI India declined by 0.67% to close at 2,017.75 points.

News

Nigeria:

Inflation Drops to 15.40%
FG debt servicing gulps ₦2.49tn in nine months – DMO report
World Bank announces \$93bn package for Nigeria, 73 others

Kenya:

French lender, Ecobank seize Mumias Sugar from KCB
Oil companies get Sh8bn for unchanged fuel prices
Kenyan tech start-up gets Sh226m to expand into three countries

Abu Dhabi:

IHC agrees merger of Al Tamouh Investments and Al Qudra Holding
Eight UAE investors to take up to 20% stake in Adnoc's Ta'ziz projects
Mubadala and Italy's Fincantieri sign deal to develop advanced technologies

Saudi Arabia:

Saudi Arabia's November inflation rises 1.1% on higher gasoline prices
Saudi Venture Capital Company supports 100 startups, 29 investment funds
Saudi's Almunajem Foods retail IPO 12 times oversubscribed

Egypt:

Egypt welcomes cooperation with African cities within UCLG
HSBC Egypt launches EGP 3bn 'Foras Trade Fund' for SMEs
Egypt, Norway's Sectec looking to cooperate in renewable energy projects

South Africa:

SA inflation reaches 5.5%, highest in almost five years
SA state debt nears 100% of estimate for fiscal year
Eskom Lowers Debt, Advances Plans to Restructure Key Units

India:

Saudi Aramco looks to invest in Reliance New Energy Solar: Report
SBI MF prepares for IPO as SBI plans to sell 6% stake
Govt unveils 76,000 cr plan to boost semiconductor manufacturing

Vietnam:

Vietnamese, German firms join hands in developing wind power projects
Da Nang, Thailand step up trade and investment ties
First Vietnamese bank shakes hands with Alibaba.com

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,819.12	-0.3%	-0.7%	3.2%	74.8%	AED/USD	3.67	0.0%	0.0%
Egypt	11,622.10	0.04%	0.8%	2.0%	7.2%	EGP/USD	15.74	0.0%	0.1%
India	17,221.40	-0.6%	-1.7%	1.4%	23.2%	INR/USD	76.23	0.5%	4.3%
Kenya	1,869.49	0.3%	0.7%	-0.1%	0.1%	KES/USD	112.90	0.0%	3.4%
Nigeria	1,704.13	0.1%	1.3%	-2.4%	3.9%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,143.38	1.1%	1.9%	3.5%	28.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	65,102.29	-0.2%	-0.4%	1.6%	19.7%	ZAR/USD	16.18	0.4%	10.1%
Vietnam	1,519.42	0.2%	0.0%	-1.2%	41.9%	VND/USD	23,035.00	0.1%	-0.2%

MSCI Emerging Markets

MSCI Frontier	655.67	0.0%	-0.6%	-0.1%	14.7%	Brent Crude (\$)	73.88	0.2%	42.6%
MSCI Frontier 100	1,508.78	-0.1%	-0.5%	-0.2%	19.9%	Gold (\$)	1,764.50	-0.4%	-6.9%
MSCI Emerging	1,214.50	-0.6%	-1.9%	0.2%	-5.9%	Copper (\$)	9,199.50	-2.3%	18.5%
MSCI World (USD)	3,175.11	1.2%	-0.4%	2.4%	18.0%	Coffee (\$)	204.97	0.3%	71.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.00	3.4%	-9.9%	10.26	International Breweries	4.70	-4.1%	-21.0%	243.43
Dangote Sugar	16.40	2.8%	-6.8%	41.24	Transnational Corporation	0.95	-2.1%	5.6%	2.43
Ecobank	9.20	1.7%	53.3%	7.30	UACN	9.60	-2.0%	51.5%	4.62
Nigerian Breweries	48.00	1.1%	-14.3%	336.98	UBN	4.85	-2.0%	-9.3%	10.10
FBNH	12.10	0.8%	69.2%	393.64	UBA	7.75	-1.9%	-10.4%	27.49
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%	3.53	Nascon	13.05	13.00	0.4%	0.19
Airtel Africa	955.00	955.00	0.0%	0.03	Nigerian Breweries	48.00	46.50	3.2%	336.98
United Capital Plc	10.00	10.00	0.0%	16.06	Nestle	1395.00	1350.00	3.3%	3.88
Ecobank	9.20	9.30	-1.1%	7.30	International Breweries	4.70	4.50	4.4%	243.43
Presco	87.80	89.00	-1.3%	7.97	Sterling	1.49	1.40	6.4%	1.30

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	7.7%	8.1%	0.00	Commercial Bank Intl	0.59	-10.0%	-22.0%	0.03
RESPONSE PLUS HOLDING	9.80	3.9%	-21.6%	2.34	National Corp for Tourism & Hotels	2.70	-10.0%	49.2%	0.00
Easylease motorcycle rentals	27.30	3.7%	55.1%	2.31	ARAM GROUP	2.90	-9.9%	-3.3%	0.04
Abu Dhabi National Ins. Co	6.70	3.1%	31.4%	2.21	Ras Al Khaimah Poultry	2.77	-9.8%	91.0%	0.01
Sharjah Islamic Bank	1.89	1.1%	43.2%	0.82	ZEE STORE PRJSC	30.06	-5.5%	186.3%	17.66
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Insurance House	0.91	0.91	0.0%	0.00	Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00
Al Buhaira Ntl Ins.	1.82	1.82	0.0%	0.11	National Bank of Fujairah	5.00	4.98	0.4%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Ooredoo QPSC	6.91	6.59	4.8%	5.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.00
Fujairah Building Industries	1.50	1.50	0.0%	0.00	Emirates Insurance Co.	7.00	6.30	11.1%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Credit Agricole Egypt	32.82	4.1%	13.1%	11.13	Speed Medical	1.10	-4.3%	-32.8%	37.75
Medinet Nasr Housing	2.69	3.9%	-26.8%	81.92	Heliopolis Housing	6.53	-2.5%	7.0%	60.47
Ibsina Pharma	3.81	3.0%	-25.1%	13.21	Cairo For Investment And Real Estate Development	13.50	-2.2%	-7.8%	3.18
Cleopatra Hospital Company	4.90	2.9%	2.9%	39.09	Oriental Weavers	8.30	-1.8%	21.2%	4.60
Ezz Steel	15.00	2.7%	39.8%	66.76	Sidi Kerir Petrochemicals	7.04	-1.1%	-9.3%	5.56
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£)
Credit Agricole Egypt	32.82	33.38	-1.7%	11.13	Eastern Company	10.81	10.50	3.0%	26.71
Egyptian Financial Group-HermesHolding Company	14.72	14.99	-1.8%	18.55	Gadwa For Industrial Development	1.00	0.95	5.0%	2.06
Telecom Egypt	15.98	16.42	-2.7%	20.93	Aspire Capital Holding	0.26	0.24	7.5%	0.35
Commercial International Bank(Egypt)	52.00	54.15	-4.0%	142.28	Citadel Capital - Common Shares	1.20	1.09	10.1%	2.37
GB AUTO	4.80	5.05	-5.0%	10.85	Sidi Kerir Petrochemicals	7.04	6.33	11.2%	5.56

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Sun Pharma	777.00	2.8%	31.2%	4751.176	Bajaj Finance	6859.00	-2.9%	29.5%	12556.90
Kotak Mahindra Bank	1867.00	1.5%	-6.4%	9866.41	Bajaj Finserv	16690.00	-2.5%	87.4%	4258.80
Maruti Suzuki India	7561.00	0.9%	-1.2%	3997.34	Adani Ports And Sez.	745.30	-2.4%	54.1%	3514.92
Tata Consumer products Ltd.	745.90	0.9%	26.4%	1247.53	ITC	223.95	-2.0%	7.2%	7842.33
Mahindra & Mahindra	844.00	0.9%	17.1%	2712.56	Power Grid Corp Of India	208.15	-1.9%	9.6%	2419.56
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	208.15	216.45	-3.8%	2419.56	Hero Motocorp	2505.00	2408.90	4.0%	1176.36
Larsen & Toubro	1880.45	1981.75	-5.1%	4093.08	Bajaj Auto	3303.00	3172.00	4.1%	978.21
Asian Paints	3290.55	3505.00	-6.1%	2676.89	Britannia Inds.	3537.05	3317.30	6.6%	538.47
Infosys	1734.90	1848.00	-6.1%	5289.92	Bharat Petroleum	385.20	357.00	7.9%	2151.40
Nestle India Limited	19100.00	20609.15	-7.3%	1246.26	Eicher Motors	2490.00	2303.70	8.1%	785.10

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	2.35	2.6%	1.3%	0.23	Kenya Power & Lighting Limited	1.70	-1.7%	-0.6%	0.97
NCBA Group Plc	24.95	1.8%	-6.7%	6.68	Absa Bank Kenya	11.05	-1.3%	14.4%	1.53
KCB Group Plc	43.75	1.3%	14.8%	20.21	Kengen Limited	4.51	-0.9%	-4.2%	6.00
Centum Investment Company Plc	14.75	1.0%	-8.1%	1.59	Safaricom Plc	37.70	-0.1%	10.1%	365.04
Nairobi Securities Exchange Plc	8.58	0.9%	5.1%	1.30					
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%	1.53	East African Breweries Limited	149.00	148.00	0.7%	15.84
Stanbic Holdings	92.25	99.00	-6.8%	0.44	Standard Chartered Bank Kenya Ltd	127.00	123.00	3.3%	1.00
Equity Group Holdings Plc	48.95	55.00	-11.0%	30.16	Diamond Trust Bank Limited	56.00	54.00	3.7%	0.10
The Cooperative Bank of Kenya Ltd	12.30	14.05	-12.5%	26.59	Centum Investment Company Plc	14.75	14.05	5.0%	1.59
Total Kenya Ltd	24.05	27.50	-12.5%	0.08	Bamburi Cement Limited	35.00	32.60	7.4%	0.12

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Industrial Development Co.	21.36	9.2%	50.4%	163.01	Alinma Tokio Marine Co.	33.20	-3.1%	36.2%	110.93
AlJazira Mawten REIT Fund	24.44	5.9%	7.0%	29.44	Raydan Food Co.	22.68	-2.6%	-31.3%	57.49
Jarir Marketing Co.	202.00	3.9%	16.5%	45.84	Saudi Vitrified Clay Pipes Co.	84.00	-1.9%	-15.2%	19.99
Sahara International Petrochemical Co.	44.35	3.9%	156.1%	224.46	Abdullah Saad Mohammed Abo Moati for Bookstores	42.75	-1.8%	-20.1%	16.95
Etihad Atheeb Telecommunication Co.	31.15	3.8%	181.6%	54.21	Malath Cooperative Insurance Co.	25.25	-1.8%	4.9%	17.86
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	303.00	303.00	0.0%	307.81	BinDawood Holding	98.60	98.60	0.0%	4.73
The Saudi National Bank	61.90	61.90	0.0%	121.98	Nayifat Finance Co.	32.70	32.70	0.0%	33.78
Zamil Industrial Investment	31.20	31.20	0.0%	29.24	Tanmiah Food Co.	88.00	87.10	1.0%	19.14
United Electronics Co.	134.40	134.40	0.0%	14.88	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Cooperative Assurance Co.	34.20	34.20	0.0%	3.70	National Shipping Company of Saudi Arabia	33.30	31.70	5.0%	17.06

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Old Mutual Ltd	1225.00	3.0%	20.4%	66285.52	Sasol Ltd	24988.00	-3.9%	86.6%	155316.19
NEPI Rockcastle PLC	10450.00	3.0%	11.8%	35783.61	Aspen Pharmacare Holdings Ltd	21374.00	-3.5%	70.5%	102450.73
Capitec Bank Holdings Ltd	197489.00	2.6%	37.8%	168562.00	Sibanye Stillwater	4700.00	-3.4%	-21.7%	137366.10
FirstRand Ltd	5850.00	2.5%	14.6%	201694.09	Anglo American Platinum Ltd	173000.00	-3.4%	27.3%	90149.09
MTN Group	17338.00	2.3%	188.1%	332374.26	Exxaro Resources Ltd	15078.00	-1.7%	12.0%	27734.05
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)
Capitec Bank Holdings Ltd	197489.00	198498.00	-0.5%	168562.00	SPAR Group Ltd/The	16520.00	16042.00	3.0%	42744.03
Investec Ltd	8356.00	8440.00	-1.0%	11128.77	Sibanye Stillwater	4700.00	4479.00	4.9%	137366.10
MTN Group	17338.00	17573.00	-1.3%	332374.26	Naspers Ltd	247000.00	229087.00	7.8%	316098.00
Shoprite Holdings Ltd	20920.00	21217.00	-1.4%	75030.00	Vodacom Group Ltd	13214.00	12080.00	9.4%	65670.67
Clicks Group Ltd	30281.00	31163.00	-2.8%	68897.06	Sanlam Ltd	5752.00	5229.00	10.0%	96763.54

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	52000.00	3.0%	94.0%	239184.40	PetroVietnam Power Corp	16100.00	-3.0%	20.4%	408267.02
Masan Group Corp	161000.00	2.5%	82.7%	197659.70	Vingroup JSC	100000.00	-2.4%	4.0%	289730.00
No Va Land Invest	115000.00	1.7%	139.1%	395048.00	Saigon Securities Inc	51700.00	-1.9%	132.4%	719203.87
Phat Dat Real Estate Development Corp	94000.00	1.6%	124.3%	433669.00	Vietnam Prosperity	34650.00	-1.0%	91.9%	865283.27
Ho Chi Minh City Devp	30050.00	1.5%	58.2%	137259.39	Bank for Inv. and Devp	44900.00	-0.9%	-6.3%	64058.83
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	161000.00	161000.00	0.0%	197659.70	Vinamilk	86300.00	82573.01	4.5%	104776.83
Tien Phong Commercial Joint Stock Bank	52000.00	53500.00	-2.8%	239184.40	Saigon Beer Alcohol Beverage Corp.	152500.00	139800.00	9.1%	12032.25
PetroVietnam Power Corp	16100.00	16950.00	-5.0%	408267.02	Vietcombank	99900.00	85500.00	16.8%	73156.77
Khang Dien House Trading & Investment	48200.00	51100.00	-5.7%	67730.64	Vietjet Aviation	124000.00	105800.00	17.2%	96695.20
FPT Corp	95900.00	101800.00	-5.8%	77525.56	Vincom Retail	30400.00	25100.00	21.1%	127072.00

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