

Daily Market Report

20 December 2021

JSE

JSE All-Share Index decreased 0.37% to close at 71,203.13 points on Friday, as Industrial sector recorded losses.

BRVM

BRVM Composite Index closed at 195.18 points, down by 0.57% on Friday with Sicom Côte d'Ivoire & Vivo Energy Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index increased 0.20% to close at 42,353.31 points on Friday, as Industrial, Consumer goods and Insurance sector recorded gains.

EGX

EGX 30 Index fell 0.87% to close at 11,565.72 points on Sunday, as the market lost LE 4.5 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index inched up by 0.003% to close at 996.25 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.37%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.57%
NSE Nigerian Stock Exchange	▲ 0.20%
EGX Egyptian Stock Exchange	▼ 0.87%
ESG Casablanca Stock Exchange	▲ 0.003%

African Markets

Nigeria: NSE 30 Index increased by 0.22% and closed at 1,705.47 points on Friday. International Breweries and Nascon were the top gainers.

Egypt: EGX 30 Index fell 0.87% to close at 11,565.72 points on Sunday, as the market lost LE 4.5 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.42% and closed at 1,854.55 points on Friday. Kengen and Kenya Reinsurance Corporation Ltd were the top losers.

South Africa: JSE Top 40 Index decreased 0.65% to close at 64,680.34 points on Friday, as Industrial sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 411.91
INTERBANK RATES	
OPR	11.25 ▲
Overnight	11.75 ▲

Other Emerging Markets

Abu Dhabi: ADX General plunged 2.32% to close at 8,650.71 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE remained unchanged at 484.53 points.

Vietnam: VN-30 Index increased 0.22% to close at 1,513.56 points on Friday, as the blue-chip companies recorded gains. MSCI Vietnam decreased by 0.23% to close at 1,064.67 points.

Saudi Arabia: Tadawul All Share Index dropped 1.34% to close at 11,160.24 points on Sunday, as losses in the Hotels & Tourism, Building & Construction and Transport sectors led shares lower. MSCI Saudi Arabia dropped by 1.33% to close at 1,529.60 points.

India: Nifty 50 market dropped by 1.53% to close at 16,985.20 points on Friday, as losses in the Real Estate, Banking and Auto sectors led shares lower. MSCI India dropped 1.59% to close at 1,988.51 points.

News

Nigeria:

Nigeria imports N13.7tn manufactured goods in nine months
FG grants three-year tax waivers to 16 companies
Loans from China now \$3.59bn, says DMO

Kenya:

Kenya Approved for \$258 Million IMF Disbursement After Review
Kenya's trade deficit crosses \$1trn mark as imports soar
Treasury unveils \$95b parastatal bailouts

Abu Dhabi:

Abu Dhabi attracts new investments for \$4bn chemicals hub in PPP push
UAE Central Bank extends support scheme for banks until June 30
UAE industrial giant EGA inks China deal to boost bauxite ore exports

Saudi Arabia:

Crown Prince launches Jeddah Downtown \$20bn master development plan
Saudi ACWA Power unit signs \$108mln PPAs with Uzbekistan wind farm
Saudi food delivery firm Jahez IPO set to raise over \$428mln

Egypt:

Egypt to approach surplus of 2% in FY22/23, debt to trend downward
General investments in Red Sea governorate in FY21-22 reach EGP 4.2 bln
EGX maintains sideways movement in absence of incentives

South Africa:

SA Covid-19 hospitalisations fall for first time in weeks
Implats ups RBPlat stake again as war with Northam for control heats up
Capitec considers R1bn economic deal for its permanent staff

India:

Government to mull changes in law to cut state's stake in banks
Airtel prepays Rs 15.5K cr to DoT to clear all deferred liabilities for 2014 spectrum
India, Taiwan holding talks on free-trade agreement, setting up semiconductor hub

Vietnam:

Gov't works on stopping coal-fired power development after 2030
Vietnamese, Indian firms cooperate in petrochemical refinery projects
WB, HSBC optimistic about Viet Nam's economy

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,650.71	-2.3%	-2.3%	1.2%	71.5%	AED/USD	3.67	0.0%	0.0%
Egypt	11,565.72	-0.9%	-0.9%	1.5%	6.6%	EGP/USD	15.74	0.0%	0.1%
India	16,985.20	-1.5%	0.0%	0.01%	21.5%	INR/USD	76.08	0.0%	4.1%
Kenya	1,854.55	-0.4%	0.0%	-0.9%	-0.7%	KES/USD	113.00	0.0%	3.5%
Nigeria	1,705.47	0.2%	0.0%	-2.3%	4.0%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,160.24	-1.3%	-1.3%	3.7%	28.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	64,680.34	-0.6%	0.0%	1.0%	18.9%	ZAR/USD	15.86	-0.8%	7.9%
Vietnam	1,513.56	0.2%	0.0%	-1.6%	41.4%	VND/USD	22,982.50	0.0%	-0.4%

MSCI Emerging Markets

MSCI Frontier	655.17	-0.3%	0.0%	-0.2%	14.6%	Brent Crude (\$)	73.52	-2.0%	41.9%
MSCI Frontier 100	1,511.94	-0.1%	0.0%	0.03%	20.2%	Gold (\$)	1,804.90	0.4%	-4.8%
MSCI Emerging	1,216.30	-0.6%	0.0%	0.3%	-5.8%	Copper (\$)	9,437.50	-0.7%	21.5%
MSCI World (USD)	3,139.75	-0.9%	0.0%	1.2%	16.7%	Coffee (\$)	204.80	-0.2%	71.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
P Z Cussons	6.25	5.9%	17.9%	3.93	UBN	4.60	-5.2%	-14.0%	10.53
International Breweries	4.85	3.2%	-18.5%	405.82	Ecobank	9.05	-4.7%	50.8%	15.22
Nascon	13.20	2.3%	-9.0%	2.64	Cadbury	8.70	-3.3%	-3.3%	1.05
Dangote Sugar	17.00	2.1%	-3.4%	10.26	Axamansard	2.22	-3.1%	111.4%	2.35
UBA	8.00	1.9%	-7.5%	66.57	Wema	0.76	-1.3%	10.1%	3.15
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%	3.91	Cap	18.20	18.00	1.1%	3.01
Airtel Africa	955.00	955.00	0.0%	0.11	UBN	4.60	4.50	2.2%	10.53
United Capital Plc	9.95	10.00	-0.5%	29.50	Nascon	13.20	12.90	2.3%	2.64
Presco	87.80	89.00	-1.3%	11.65	Nigerian Breweries	48.00	46.50	3.2%	8.12
Guinness	39.00	39.90	-2.3%	6.27	Nestle	1395.00	1350.00	3.3%	53.47

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Corp for Tourism and Hotels	3.00	11.1%	65.7%	0.02	Ras Al Khaimah Poultry	2.25	-10.0%	55.2%	0.01
Ras Al Khaimah Cement Investment Co	7.34	2.5%	116.5%	21.91	Abu Dhabi National for Building Materials	0.25	-10.0%	-2.7%	0.05
Al Yah Satellite Communications Company	2.78	2.2%	1.1%	12.41	Al Qudra Holding	5.32	-9.8%	383.6%	24.61
Adnoc Drilling Company Pjsc	3.33	0.9%	12.9%	20.20	REEM INVESTMENTS	37.00	-8.2%	68.2%	0.07
Abu Dhabi Aviation	4.95	0.2%	36.7%	0.06	Sharjah Cement	0.75	-7.3%	-1.3%	0.54
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	Sawaed Holding PJSC	7.05	7.05	0.0%	0.00
Al Buhaira Ntl Ins.	1.82	1.82	0.0%	0.00	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	6.84	6.59	3.8%	48.91
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	0.34	0.32	5.0%	0.34

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Speed Medical	1.19	6.7%	-27.4%	55.40	Orascom Development Egypt	5.70	-5.2%	16.3%	6.05
Cairo For Investment And Real Estate Development	13.97	4.5%	-4.6%	0.62	MM Group For Industry And International Trade	6.32	-4.0%	0.8%	5.06
Fawry For Banking Tech & Electronic Payment	11.85	0.4%	-15.6%	23.22	Egyptian Kuwaiti Holding-EGP	20.71	-3.4%	0.0%	0.49
					Palm Hills Development	1.92	-3.3%	40.5%	8.75
					Ibnsina Pharma	3.85	-2.8%	-24.4%	13.62
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-HermesHolding Company	14.91	15.25	-2.2%	39.83	Eastern Company	10.79	10.50	2.8%	0.91
Telecom Egypt	15.94	16.42	-2.9%	2.48	Gadwa For Industrial Devp	0.99	0.95	4.4%	1.05
Credit Agricole Egypt	33.56	34.60	-3.0%	6.24	Aspire Capital Holding	0.26	0.24	8.3%	0.29
GB AUTO	4.87	5.05	-3.6%	1.84	Abou Kir Fertilizers	19.90	17.90	11.2%	23.74
Heliopolis Housing	6.77	7.07	-4.2%	119.07	Sidi Kerir Petrochemicals	7.12	6.33	12.5%	4.00

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Wipro	674.75	4.7%	74.7%	34850.111	Indusind Bank	885.50	-4.6%	-1.1%	4281.21
Infosys	1823.00	2.9%	45.2%	34427.86	Tata Motors	470.20	-4.4%	155.8%	12944.95
Hcl Technologies	1170.00	0.9%	23.7%	7485.43	ONGC	139.70	-3.9%	50.1%	2489.90
Power Grid Corp Of India	209.80	0.8%	10.5%	2380.31	Kotak Mahindra Bank	1796.15	-3.5%	-10.0%	5313.78
Sun Pharm.Industries	770.00	0.7%	30.0%	5485.34	HUL	2229.95	-3.4%	-6.9%	5477.81
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	1640.15	1675.00	-2.1%	5622.82	Hero Motocorp	2448.00	2408.90	1.6%	1201.43
Power Grid Corp Of India	209.80	216.45	-3.1%	2380.31	Bajaj Auto	3205.30	3149.10	1.8%	10109.49
Larsen & Toubro	1846.00	1981.75	-6.9%	4347.57	HUL	2229.95	2120.00	5.2%	5477.81
Asian Paints	3243.90	3505.00	-7.4%	3313.38	HDFC Life Insurance Company	656.45	617.40	6.3%	1564.49
Nestle India Limited	19021.00	20609.15	-7.7%	1036.97	Britannia Inds.	3533.90	3317.30	6.5%	1083.82

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	18.50	1.9%	19.7%	0.05	Kengen Limited	4.13	-7.8%	-12.3%	0.54
Absa Bank Kenya	11.20	1.8%	15.9%	0.48	Kenya Reinsurance Corporation Ltd	2.22	-4.3%	-4.3%	0.31
Kenya Power & Lighting Limited	1.73	1.8%	1.2%	0.24	Equity Group Holdings Plc	48.65	-1.4%	33.1%	41.04
British American Tobacco Kenya Ltd	435.00	1.4%	20.5%	4.48	WPP Scangroup Plc	3.91	-1.3%	-34.8%	0.14
Safaricom Plc	37.95	0.5%	10.8%	85.22	East African Breweries Limited	148.25	-1.2%	-3.9%	417.55
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	11.20	11.40	-1.8%	0.48	East African Breweries Limited	148.25	148.00	0.2%	417.55
Stanbic Holdings	92.50	99.00	-6.6%	19.48	Standard Chartered Bank Kenya Ltd	126.50	123.00	2.8%	16.29
Equity Group Holdings Plc	48.65	55.00	-11.5%	41.04	Centum Investment Company Plc	14.45	14.05	2.8%	0.34
The Cooperative Bank of Kenya Ltd	12.30	14.05	-12.5%	2.29	Diamond Trust Bank Limited	57.00	54.00	5.6%	0.00
British American Tobacco Kenya Ltd	435.00	500.00	-13.0%	4.48	Kenya Reinsurance Corporation Ltd	2.22	2.10	5.7%	0.31

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Mouwasat Medical Services	167.20	3.6%	21.2%	13.30	Banque Saudi Fransi	42.10	-5.2%	33.2%	13.41
Arab Sea Information System Co.	189.00	3.5%	121.1%	156.52	Arabia Insurance Cooperative Co.	41.00	-5.0%	117.2%	19.16
Tanmiah Food Co.	90.70	3.0%	35.4%	86.60	Saudi Arabian Fertilizer Co.	128.60	-4.7%	59.6%	69.11
Swicorp Wabel REIT Fund	7.53	2.3%	1.6%	12.49	Arabian Shield Cooperative Insurance Co.	26.60	-4.5%	9.9%	18.58
MEFIC REIT Fund	7.62	2.3%	5.7%	10.98	Tabuk Agricultural Development Co.	31.90	-4.4%	-1.5%	23.93
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	293.20	293.20	0.0%	117.91	BinDawood Holding	97.60	97.60	0.0%	5.68
International Company for Water and Power Projects	79.90	79.90	0.0%	216.39	Nayifat Finance Co.	32.35	32.35	0.0%	29.20
The Saudi National Bank	61.90	61.90	0.0%	88.37	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment	29.90	29.90	0.0%	36.48	National Shipping Company of Saudi Arabia	32.95	31.70	3.9%	24.18
United Electronics Co.	133.00	133.00	0.0%	11.27	Tanmiah Food Co.	90.70	87.10	4.1%	86.60

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Aspen Pharmacare Holdings	22516.00	5.3%	79.6%	83548.68	MultiChoice Group	12035.00	-5.0%	-10.2%	122378.11
AngloGold Ashanti Ltd	32313.00	5.1%	-5.7%	121596.44	Cie Financiere Richemont SA	22703.00	-5.0%	73.2%	161939.70
Gold Fields Ltd	17048.00	4.9%	23.9%	99272.36	Naspers Ltd	236472.00	-4.3%	-21.7%	327337.55
Impala Platinum Holdings Ltd	21982.00	3.9%	8.9%	123130.30	Prosus NV	121024.00	-3.5%	-24.5%	281867.32
Old Mutual Ltd	1264.00	3.2%	24.2%	51123.04	SPAR Group Ltd/The	16080.00	-2.7%	-15.2%	83347.05
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)
Investec Ltd	8485.00	8536.00	-0.6%	50539.46	SPAR Group Ltd/The	16080.00	15975.00	0.7%	83347.05
Capitec Bank Holdings Ltd	199940.00	201240.00	-0.6%	99150.05	Naspers Ltd	236472.00	229087.00	3.2%	327337.55
Investec PLC	8398.00	8495.00	-1.1%	71801.02	Prosus NV	121024.00	113890.83	6.3%	281867.32
Clicks Group Ltd	30794.00	31500.00	-2.2%	58402.02	Sibanye Stillwater	4807.00	4479.00	7.3%	164029.08
British American Tobacco PLC	57735.00	59245.00	-2.5%	50814.13	Vodacom Group Ltd	13294.00	12150.00	9.4%	48859.33

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	50400.00	4.1%	89.2%	303135.84	Vietcombank	96500.00	-2.6%	-1.4%	335405.05
Saigon Securities Inc	52500.00	3.1%	136.0%	847507.50	Phat Dat Real Estate Development Corp	95500.00	-2.3%	127.8%	375754.30
Vinhomes	84500.00	2.7%	24.1%	2128200.10	Vietnam Rubber Group JSC	46700.00	-1.7%	52.9%	1028128.52
Vincom Retail	30800.00	2.3%	-1.9%	452790.80	Hoa Phat Group JSC	46700.00	-1.7%	52.9%	1028128.52
Vingroup JSC	102000.00	2.0%	6.1%	678810.00	Masan Group Corp	157500.00	-1.6%	78.7%	470074.50
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Khang Dien House Trading & Investment	50400.00	51100.00	-1.4%	303135.84	Vinamilk	85700.00	82573.01	3.8%	227979.14
Masan Group Corp	157500.00	161900.00	-2.7%	470074.50	Saigon Beer Alcohol Beverage Corp.	150000.00	139800.00	7.3%	28395.00
Tien Phong Commercial Joint Stock Bank	51300.00	53500.00	-4.1%	223965.54	Vietcombank	96500.00	85500.00	12.9%	335405.05
Phat Dat Real Estate Development Corp	95500.00	99800.00	-4.3%	375754.30	Vietjet Aviation	122500.00	105800.00	15.8%	91176.75
PetroVietnam Power Corp	17100.00	18000.00	-5.0%	505074.15	Vietnam National Petroleum Group	54300.00	44568.25	21.8%	55581.48

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