

Daily Market Report

21 December 2021

JSE

JSE All-Share Index dropped by 1.57% to close at 70,087.63 points on Monday, as Industrial, Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 195.99 points, up by 0.42% on Monday with Ecobank Transnational Inc & Sicor Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.10% to close at 42,394.71 points on Monday, as Industrial, Consumer goods and Banking sectors recorded gains.

EGX

EGX 30 Index decreased 0.72% to close at 11,482.43 points on Monday. as the market lost LE 3.5 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.48% to close at 991.47 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.57%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.42%
NSE Nigerian Stock Exchange	▲ 0.10%
EGX Egyptian Stock Exchange	▼ 0.72%
ESG Casablanca Stock Exchange	▼ 0.48%

African Markets

Nigeria: NSE 30 Index increased marginally by 0.09% and closed at 1,707.03 points on Monday. UBN and FBNH were the top gainers.

Egypt: EGX 30 Index decreased 0.72% to close at 11,482.43 points on Monday. as the market lost LE 3.5 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.61% and closed at 1,865.84 points on Monday. Nairobi Securities Exchange and Kenya Reinsurance Corporation were the top gainers.

South Africa: JSE Top 40 Index dropped by 1.59% to close at 63,652.47 points on Monday, as Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 411.91
INTERBANK RATES	
OPR	12.00 ▲
Overnight	12.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General declined by 1.08% to close at 8,557.38 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE plummeted by 4.80% to close at 461.28 points.

Vietnam: VN-30 Index inched up by 0.003% to close at 1,513.60 points on Monday, as the blue-chip companies recorded gains. MSCI Vietnam slipped by 0.02% to close at 1,064.42 points.

Saudi Arabia: Tadawul All Share Index inched up 0.09% to close at 11,170.48 points on Monday, as gains in the Telecoms & IT, Financial Services and Petrochemicals sectors led shares higher. MSCI Saudi Arabia increased by 0.50% to close at 1,537.22 points.

India: Nifty 50 market dropped by 2.18% to close at 16,614.20 points on Monday, as losses in the Real Estate, Oil & Gas and Metals sectors led shares lower. MSCI India fell 2.25% to close at 1,943.74 points.

News

Nigeria:

Akwa Ibom gov signs N586.9bn budget into law
Lagos issues N137bn bond for Lekki road projects, healthcare, others
FG to spend N250bn sukuk on Abuja, Niger Delta road projects, says DMO

Kenya:

CBK Accepts Bids Worth KSh 17.9 Billion at Weekly T-Bills Auction
Carbacid remains glued to Sh1.2bn BOC acquisition bid
KRA's bid to lift fuel excise duty freeze order flops

Abu Dhabi:

UAE Central Bank tightens oversight of banks' real estate exposure
Abu Dhabi IHC acquires majority stake in Al Qudra Holding
Adnoc Drilling signs deal to boost performance of land rigs

Saudi Arabia:

Saudi unemployment rate remains unchanged at 11.3% in 3Q
Saudi Arabia to privatize all its airports: GACA
Saudi insurer Gulf Union Al Ahlia mulls Al Sagr Insurance merger

Egypt:

Egypt's latest T-bills auction attracts EGP 45 bln: CBE
Egypt, IFC discuss bilateral cooperation in light of development priorities
NBE, Misr Life Insurance launch new investment fund

South Africa:

Eskom splits off transmission division
Amplats to sell Bokoni Mine to African Rainbow Minerals
Nedbank issues bond aimed at greening residential sector development

India:

Wipro buys US cybersecurity co for \$230mn
Reliance co picks up 60% in Anamika Khanna label
Axis to raise Rs 5,000cr through bond issue

Vietnam:

BB Group to invest \$5 billion into project cluster in Quảng Trị
Ministry of Planning and Investment to assess industrial zones' operations
Tra fish export value estimated at 1.54 billion USD this year

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,557.38	-1.1%	-3.4%	0.1%	69.6%	AED/USD	3.67	0.0%	0.0%
Egypt	11,482.43	-0.7%	-1.6%	0.8%	5.9%	EGP/USD	15.71	-0.2%	-0.1%
India	16,614.20	-2.2%	-2.2%	-2.2%	18.8%	INR/USD	75.92	-0.2%	3.9%
Kenya	1,865.84	0.6%	0.6%	-0.3%	-0.1%	KES/USD	113.05	0.0%	3.5%
Nigeria	1,707.03	0.1%	0.1%	-2.2%	4.1%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,170.48	0.1%	-1.3%	3.8%	28.6%	SAR/USD	3.75	0.0%	0.1%
South Africa	63,652.47	-1.6%	-1.6%	-0.6%	17.1%	ZAR/USD	15.76	-0.6%	7.3%
Vietnam	1,513.60	0.003%	0.003%	-1.6%	41.4%	VND/USD	22,930.50	-0.2%	-0.7%

MSCI Emerging Markets

MSCI Frontier	653.70	-0.2%	-0.2%	-0.4%	14.4%	Brent Crude (\$)	71.52	-2.7%	38.1%
MSCI Frontier 100	1,505.18	-0.4%	-0.4%	-0.4%	19.7%	Gold (\$)	1,794.60	-0.6%	-5.3%
MSCI Emerging	1,190.08	-2.2%	-2.2%	-1.8%	-7.8%	Copper (\$)	9,446.50	0.1%	21.6%
MSCI World (USD)	3,100.50	-1.3%	-1.3%	0.0%	15.3%	Coffee (\$)	204.09	-0.3%	71.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBN	4.85	5.4%	-9.3%	4.00	Ecobank	8.85	-2.2%	47.5%	31.05
Wema	0.80	5.3%	15.9%	4.12	Sterling	1.48	-2.0%	-27.5%	0.76
FBNH	12.20	1.2%	70.6%	246.32	MTNN	185.90	-0.6%	9.4%	356.70
Cadbury	8.80	1.1%	-2.2%	2.25					
Dangote Cement	256.50	0.6%	4.7%	720.79					
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%	3.83	Cap	18.20	18.00	1.1%	0.59
Airtel Africa	955.00	955.00	0.0%	2.99	Nascon	13.20	12.90	2.3%	1.78
United Capital Plc	9.95	10.00	-0.5%	12.28	Nigerian Breweries	48.00	46.50	3.2%	124.13
Presco	87.80	89.00	-1.3%	1.25	Nestle	1395.00	1350.00	3.3%	5.29
Guinness	39.00	39.90	-2.3%	7.63	Sterling	1.48	1.40	5.7%	0.76

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	0.27	5.2%	2.3%	0.00	ARAM GROUP	2.62	-9.7%	-12.7%	0.00
Abu Dhabi Ship Building	3.69	3.9%	58.4%	0.84	Al Qudra Holding	5.00	-6.0%	354.5%	14.23
ZEE STORE PRJSC	30.50	3.0%	190.5%	20.34	Emirates Telecom	33.70	-5.3%	99.4%	185.26
Finance House	1.89	2.7%	-0.5%	0.00	Gulf Cement	0.67	-4.3%	-20.1%	0.27
Gulf Pharmaceutical Ind.	1.81	2.3%	36.1%	2.09	RAS AL KHAIMAH CEMENT INVESTMENT CO	7.04	-4.1%	107.7%	10.51
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	Sawadeed 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	6.81	6.59	3.2%	7.78
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%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ibsina Pharma	3.89	1.0%	-23.6%	5.35	Alexandria Mineral Oils Company	3.43	-5.2%	9.9%	14.93
T M G Holding	8.72	0.5%	32.7%	9.80	Orascom Development	5.50	-3.5%	12.2%	21.07
Abou Kir Fertilizers	19.98	0.4%	-3.4%	26.03	Cairo For Investment And Real Estate Development	13.50	-3.4%	-7.8%	2.12
Telecom Egypt	16.00	0.4%	34.1%	9.73	MM Group For Industry And International Trade	6.16	-2.5%	-1.8%	10.51
Heliopolis Housing	6.78	0.1%	11.1%	151.31	GB AUTO	4.76	-2.3%	43.4%	1.96
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	16.00	16.42	-2.6%	9.73	Eastern Company	10.75	10.50	2.4%	13.41
Egyptian Financial Group-HermesHolding Company	14.85	15.25	-2.6%	6.84	Gadwa For Industrial Development	0.99	0.95	3.5%	0.83
Heliopolis Housing	6.78	7.07	-4.1%	151.31	Aspire Capital Holding	0.26	0.24	7.1%	0.56
Credit Agricole Egypt	32.92	34.60	-4.9%	9.03	MM Group For Industry And International Trade	6.16	5.61	9.8%	10.51
GB AUTO	4.76	5.05	-5.7%	1.96	Sidi Kerir Petrochemicals	6.97	6.33	10.1%	7.06

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Cipla	892.15	3.7%	8.8%	7506.871	Bharat Petroleum	359.75	-6.5%	-5.6%	4120.90
HUL	2270.00	1.8%	-5.2%	4870.42	Tata Motors	445.55	-5.2%	142.3%	14838.86
Dr Reddys Lab	4561.05	1.0%	-12.4%	1547.75	Tata Steel	1073.00	-5.2%	66.7%	7961.60
					Indusind Bank	848.00	-4.0%	-5.2%	3987.35
					Bajaj Finance	6630.00	-3.9%	25.2%	14718.97
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	209.70	216.45	-3.1%	3551.96	Bharat Petroleum	359.75	357.00	0.8%	4120.90
Tech Mahindra	1602.20	1675.00	-4.3%	3577.14	Bajaj Auto	3101.00	3027.05	2.4%	1839.22
Asian Paints	3236.20	3505.00	-7.7%	3049.66	Hero Motocorp	2368.00	2310.00	2.5%	1617.03
Nestle India Limited	18906.00	20609.15	-8.3%	1345.70	HDFC Life Insurance Company	634.60	617.40	2.8%	1571.23
Larsen & Toubro	1799.00	1981.75	-9.2%	4464.25	Eicher Motors	2406.50	2303.70	4.5%	1136.75

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	8.46	5.8%	10.2%	0.24	Kenya Power & Lighting Limited	1.70	-1.7%	-0.6%	0.69
Kenya Reinsurance Corporation Ltd	2.32	4.5%	0.0%	0.14	Bamburi Cement Limited	34.65	-1.1%	-8.5%	1.94
KenGen Limited	4.27	3.4%	-9.3%	0.12	Absa Bank Kenya	11.10	-0.9%	14.9%	0.54
Nation Media Group	18.95	2.4%	22.7%	0.03	The Cooperative Bank of Kenya Ltd	12.20	-0.8%	-2.4%	1.52
WPP Scangroup Plc	4.00	2.3%	-33.3%	0.01	Centum Investment Company Plc	14.40	-0.3%	-10.3%	0.23
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	11.10	11.40	-2.6%	0.54	East African Breweries Limited	151.00	148.00	2.0%	24.64
Stanbic Holdings	94.00	99.00	-5.1%	0.00	Centum Investment Company Plc	14.40	14.05	2.5%	0.23
Equity Group Holdings Plc	48.75	55.00	-11.4%	85.84	Standard Chartered Bank Kenya Ltd	127.50	123.00	3.7%	0.91
KCB Group Plc	44.50	50.75	-12.3%	7.57	Bamburi Cement Limited	34.65	33.00	5.0%	1.94
British American Tobacco Kenya Ltd	435.00	500.00	-13.0%	29.36	Diamond Trust Bank Limited	57.25	54.00	6.0%	0.23

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Almunajem Foods Co.	63.40	5.7%	0.0%	939.47	Arabian Shield Cooperative Insurance Co.	25.50	-4.1%	5.4%	28.82
Al-Jouf Agricultural Development Co.	64.00	5.4%	74.4%	213.18	Rabigh Refining and Petrochemical Co.	20.72	-3.8%	49.9%	106.35
Alinma Tokio Marine Co.	34.40	4.9%	41.1%	103.41	Jabal Omar Development Co.	26.90	-3.1%	-7.6%	41.86
Banque Saudi Fransi	44.00	4.5%	39.2%	19.87	Batic Investments and Logistics Co.	25.95	-3.0%	-25.6%	35.31
The National Company for Glass Industries	41.40	3.9%	51.4%	94.49	Alujain Holding Corp.	57.30	-2.9%	21.8%	8.91
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	293.80	293.80	0.0%	115.27	BinDawood Holding	96.90	96.90	0.0%	4.66
International Company for Water and Power Projects	79.70	79.70	0.0%	136.60	Nayifat Finance Co.	32.05	32.05	0.0%	30.47
The Saudi National Bank	62.30	62.30	0.0%	137.81	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment	29.80	29.80	0.0%	28.33	Almunajem Foods	63.40	62.60	1.3%	939.47
United Electronics Co.	130.60	130.60	0.0%	19.01	Tanmiah Food Co.	89.00	87.10	2.2%	47.73

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Prosus NV	122033.00	0.8%	-23.9%	104797.79	Impala Platinum Holdings Ltd	20776.00	-5.5%	2.9%	46052.87
Shoprite Holdings Ltd	20663.00	0.5%	47.6%	19752.32	Sasol Ltd	24328.00	-4.1%	81.6%	37511.17
Naspers Ltd	237500.00	0.4%	-21.3%	85640.36	Gold Fields Ltd	16375.00	-3.9%	19.0%	32448.62
Clicks Group Ltd	30905.00	0.4%	22.3%	16566.19	Mondi PLC	36895.00	-3.8%	7.5%	17231.51
British American Tobacco PLC	57820.00	0.1%	6.0%	29053.28	Aspen Pharmacare Holdings Ltd	21778.00	-3.3%	73.7%	16770.85
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	197454.00	201240.00	-1.9%	25794.80	SPAR Group Ltd/The	16013.00	15842.00	1.1%	12772.40
Clicks Group Ltd	30905.00	31500.00	-1.9%	16566.19	Naspers Ltd	237500.00	229087.00	3.7%	85640.36
British American Tobacco PLC	57820.00	59245.00	-2.4%	29053.28	Sibanye Stillwater	4655.00	4479.00	3.9%	42633.31
Investec Ltd	8314.00	8542.00	-2.7%	4232.11	Prosus NV	122033.00	113890.83	7.1%	104797.79
Shoprite Holdings Ltd	20663.00	21306.00	-3.0%	19752.32	Sanlam Ltd	5645.00	5229.00	8.0%	13250.31

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	18250.00	6.7%	36.4%	701088.35	Vingroup JSC	99000.00	-2.9%	2.9%	135907.20
Tien Phong Commercial Joint Stock Bank	39800.00	4.7%	100.5%	327908.22	Vietnam National Petroleum Group	53000.00	-2.4%	-0.9%	79123.70
Vietcombank	99500.00	3.1%	1.6%	73321.55	Petrovietnam Gas	96700.00	-2.3%	15.2%	83229.69
Masan Group Corp	162000.00	2.9%	83.8%	815443.20	BaoViet Holdings	56600.00	-1.7%	-13.0%	63063.72
Saigon Securities Inc	53500.00	1.9%	140.5%	994244.00	Vietnam JSC Bank	32450.00	-1.5%	24.2%	159637.78
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	18250.00	18250.00	0.0%	701088.35	Vinamilk	85700.00	82573.01	3.8%	154859.90
Tien Phong Commercial Joint Stock Bank	39800.00	40000.00	-0.5%	327908.22	Saigon Beer Alcohol Beverage Corp.	149000.00	139800.00	6.6%	17447.90
Masan Group Corp	162000.00	162900.00	-0.6%	815443.20	Vietjet Aviation	122100.00	105800.00	15.4%	86446.80
Khang Dien House Trading & Investment	50000.00	51100.00	-2.2%	87285.00	Vietcombank	99500.00	85500.00	16.4%	73321.55
Phat Dat Real Estate Development Corp	95500.00	99800.00	-4.3%	431106.10	Vietnam National Petroleum Group	53000.00	44568.25	18.9%	79123.70

Email: research@fsdhgroup.com • www.fsdhgroup.com

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