

Daily Market Report

31 December 2021

JSE

JSE All-Share Index increased 0.75% to close at 73,786.45 points on Thursday, as all major sectors recorded gains.

BRVM

BRVM Composite Index closed at 201.64 points, up by 1.17% on Thursday, with Coris Bank International & Bank of Africa - Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index inched up by 0.01% to close at 41,813.27 points on Thursday, as Insurance and Banking sectors recorded gains.

EGX

EGX 30 Index rose 0.43% to close at 11,949.18 points on Thursday, as the market added LE 12.1 bln to market cap, amid domestic buying.

ESG

Casablanca ESG 10 Index gained 0.09% to close at 999.26 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.75%
BRVM Bourse Régionale des Valeurs Mobilières	▲	1.17%
NSE Nigerian Stock Exchange	▲	0.01%
EGX Egyptian Stock Exchange	▲	0.43%
ESG Casablanca Stock Exchange	▲	0.09%

African Markets

Nigeria: NSE 30 Index slipped 0.01% and closed at 1,677.48 points on Thursday. Ecobank and Dangote Sugar were the top losers.

Egypt: EGX 30 Index rose 0.43% to close at 11,949.18 points on Thursday, as the market added LE 12.1 bln to market cap, amid domestic buying.

Kenya: NSE 20 Index fell 0.09% and closed at 1,897.62 points on Thursday. Safaricom Plc and Kenya Reinsurance Corporation Ltd were the top losers.

South Africa: JSE Top 40 Index increased 0.77% to close at 67,129.56 points on Thursday, as all major sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 412.70
INTERBANK RATES	
OPR	10.00 ▼
Overnight	11.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased 0.45% to close at 8,488.36 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE increased 0.89% to close at 451.36 points.

Vietnam: VN-30 Index rose 0.24% to close at 1,519.62 points on Thursday, as the blue-chip stocks recorded gains. MSCI Vietnam decreased 0.18% to close at 1,059.07 points.

Saudi Arabia: Tadawul All Share Index increased 0.73% to close at 11,281.71 points on Thursday, as gains in the Media & Publishing, Energy & Utilities and Petrochemicals sectors led shares higher. MSCI Saudi Arabia increased 0.85% to close at 1,564.52 points.

India: Nifty 50 Index slipped 0.06% to close at 17,203.95 points on Thursday, as losses in the Oil & Gas, Metals and Real Estate sectors pulled shares lower. MSCI India decreased 0.26% to close at 2,017.26 points.

News

Nigeria:

Nigeria's economy was on steady recovery path in 2021 - FG
FG borrows N1.99tn via bonds in six months amid rising deficit financing
Fed Govt releases N16.7b for accrued pension rights

Kenya:

Kenya Power borrows KSh 6.8 Billion from NCBA
Treasury to tap Central Bank's IMF dollar reserves for budget
China rejected Kenya's request for Sh32.8b debt moratorium

Abu Dhabi:

Masdar to develop Georgia's largest solar power plant
Mubadala to exit its holdings in US data centre company Cologix
AD Ports Group and China's Shandong to build Middle East's first tyre hub in AD

Saudi Arabia:

Saudi Arabia's Gas Arabian gets approval for 5% public offering
Saudi Alinma Bank's board recommends \$211.7m cash dividends for H2
Alinma Bank's board proposes 4% dividend distribution for H2-21

Egypt:

LE 957.5M disbursed under 4th phase of immediate cash initiative for exporters so far
Egyptian food industry exports up \$3.8 billion in 11 months
Egypt close to achieving highest exports in its history, exporters explain reasons: CNN

South Africa:

Kusile Unit 4 connected to grid for first time, helping to ease power crunch
South Africa pauses plan to scrap Covid-19 contact tracing
South Africa lifts curfew as it says COVID-19 fourth wave peaks

India:

Reliance New Energy Solar acquires 100% stake in Faradion Limited
SBI acquires 9.95% stake in India International Exchange
India, Australia expected to complete talks for interim FTA soon

Vietnam:

Binh Duong posts 6.8 billion USD in trade surplus
3.74 billion USD of FDI poured into HCM City in 2021
Export-import turnover tops 668 billion USD

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,488.36	0.4%	0.7%	-0.7%	68.2%	AED/USD	3.67	0.0%	0.0%
Egypt	11,949.18	0.4%	1.6%	4.9%	10.2%	EGP/USD	15.71	0.0%	-0.1%
India	17,203.95	-0.1%	1.2%	1.3%	23.0%	INR/USD	74.42	-0.4%	1.9%
Kenya	1,897.62	-0.1%	-0.2%	1.4%	1.6%	KES/USD	113.15	0.0%	3.6%
Nigeria	1,677.48	-0.01%	-1.4%	-3.9%	2.3%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,281.71	0.7%	0.1%	4.8%	29.8%	SAR/USD	3.75	0.0%	0.1%
South Africa	67,129.56	0.8%	3.2%	4.8%	23.4%	ZAR/USD	15.99	0.4%	8.9%
Vietnam	1,519.62	0.2%	0.9%	-1.2%	41.9%	VND/USD	22,800.00	-0.1%	-1.2%

MSCI Emerging Markets

MSCI Frontier	660.58	-0.3%	0.0%	0.6%	15.6%	Brent Crude (\$)	79.32	0.1%	53.1%
MSCI Frontier 100	1,522.57	-0.1%	0.3%	0.7%	21.0%	Gold (\$)	1,814.10	0.5%	-4.3%
MSCI Emerging	1,222.75	0.4%	0.2%	0.9%	-5.3%	Copper (\$)	9,691.50	0.1%	24.8%
MSCI World (USD)	3,237.07	-0.2%	0.9%	4.4%	20.3%	Coffee (\$)	200.46	0.05%	68.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Sterling	1.50	2.7%	-26.5%	45.81	Ecobank	8.35	-3.5%	39.2%	7.05
Wema	0.79	2.6%	14.5%	7.39	Dangote Sugar	16.50	-2.9%	-6.3%	4.42
UBA	8.00	1.3%	-7.5%	59.59	Fidelity	2.55	-1.5%	1.2%	19.20
Access	9.10	1.1%	7.7%	309.82	Lafarge Africa	23.70	-1.0%	12.6%	14.54
Zenith	25.00	1.0%	0.8%	224.95	UBN	6.05	-0.8%	13.1%	54.13
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%	0.30	Nascon	13.20	12.90	2.3%	0.40
Airtel Africa	955.00	955.00	0.0%	0.49	Nigerian Breweries	48.00	46.50	3.2%	1.40
United Capital Plc	9.90	10.00	-1.0%	20.20	International Breweries	4.70	4.50	4.4%	0.49
Presco	87.80	89.00	-1.3%	4.52	Nestle	1415.00	1350.00	4.8%	0.71
UBN	6.05	6.15	-1.6%	54.13	Sterling	1.50	1.40	7.1%	45.81

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Commercial Bank Intl	0.61	14.9%	-18.8%	0.01	Abu Dhabi National Takaful	6.16	-9.9%	57.9%	0.02
Ras Al Khaimah Poultry	2.33	14.8%	60.7%	0.01	Eshraq Investments	0.36	-6.3%	11.9%	114.25
AXA Green Crescent Ins.	0.65	14.7%	-5.2%	0.04	Palms Sports	12.22	-5.1%	-7.4%	4.02
Abu Dhabi Ship Building	4.00	10.5%	71.7%	8.24	Gulf Cement	0.70	-3.5%	-16.6%	0.41
Easylease motorcycle rentals	29.00	5.5%	64.8%	2.65	ESG Emirates Stallions Group P.J.S.C	8.00	-2.3%	92.3%	10.17
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)
Insurance House	0.91	0.91	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.00
Al Buhaira Ntl Ins.	1.90	1.90	0.0%	0.00	Sharjah Insurance	1.06	1.00	6.0%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Ooredoo QPSC	7.02	6.59	6.5%	7.68
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Sudatel Telecom	0.35	0.32	8.8%	0.00
Union Insurance Co	0.72	0.72	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£)
Gadwa For Industrial Development	1.07	6.4%	0.0%	3.19	Fawry For Banking Technology And Electronic Payment	12.81	-1.8%	-8.8%	67.07
Aspire Capital Holding For Financial Investments	0.29	4.3%	-68.7%	2.94	Egyptian Kuwaiti Holding-EGP	19.65	-1.2%	0.0%	26.82
Pioneers Properties For Urban Development (PREDCO)	2.68	3.1%	0.0%	7.33	Cairo For Inv And Real Estate Devt	13.61	-0.9%	-7.1%	2.01
Misr Fertilizers Production Company - Mopco	97.49	2.7%	66.0%	29.80	Raya Holding For Financial Investments Tenth Of Ramadan	2.38	-0.8%	224.7%	0.36
GB AUTO	5.10	2.4%	53.6%	7.98	Pharma Industries & Diagnostic-Rameda	2.40	-0.8%	-18.0%	21.55
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	16.77	16.93	-0.9%	25.27	Eastern Company	10.72	10.34	3.7%	6.37
GB AUTO	5.10	5.15	-1.0%	7.98	Citadel Capital - Common Shares	1.21	1.09	10.6%	5.81
Commercial International Bank (Egypt)	52.99	54.15	-2.1%	132.83	Gadwa For Industrial Development	1.07	0.95	12.1%	3.19
Credit Agricole Egypt	8.42	8.62	-2.3%	6.37	Egyptian Kuwaiti Holding-EGP	19.65	17.25	13.9%	26.82
Egyptian Financial Group-Hermes Holding Company	14.81	15.25	-2.9%	11.14	Abou Kir Fertilizers	21.50	17.90	20.1%	12.30

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	126.45	2.7%	27.3%	4083.620	Bajaj Auto	3201.00	-1.9%	-7.1%	1911.13
Indusind Bank	888.00	2.1%	-0.8%	10899.99	Reliance Industries	2364.00	-1.6%	19.1%	32040.92
Hcl Technologies	1317.00	1.9%	39.2%	5934.30	Jsw Steel	645.55	-1.6%	66.7%	2422.90
Titan Company	2448.00	1.9%	56.2%	2795.15	Tata Steel	1101.15	-1.4%	71.1%	4567.01
Cipla	952.80	1.8%	16.2%	1638.22	Maruti Suzuki India	7273.00	-1.1%	-4.9%	2165.32
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Sun Pharma Industries	833.85	851.00	-2.0%	4331.40	HDFC Life Insurance Company Ltd	641.50	627.00	2.3%	822.55
Tech Mahindra	1799.65	1838.00	-2.1%	8426.64	Hero Motocorp	2428.00	2310.00	5.1%	888.81
Wipro	716.15	739.85	-3.2%	6461.71	Bajaj Auto	3201.00	3027.05	5.7%	1911.13
Asian Paints	3368.00	3505.00	-3.9%	2331.34	Bharat Petroleum	378.00	357.40	5.8%	2308.67
Hcl Technologies	1317.00	1377.75	-4.4%	5934.30	Britannia Inds.	3586.00	3317.30	8.1%	594.54

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	26.00	2.8%	-2.8%	0.48	Safaricom Plc	37.65	-2.8%	9.9%	50.92
WPP Scangroup Plc	4.11	2.8%	-31.5%	0.05	Kenya Reinsurance Corporation Ltd	2.24	-2.2%	-3.4%	0.19
Equity Group Holdings Plc	51.00	2.0%	39.5%	1.71	Kengen Limited	4.10	-2.1%	-13.0%	0.79
Stanbic Holdings	88.00	1.4%	3.5%	0.01	East African Breweries Limited	165.25	-1.5%	7.1%	8.38
Bamburi Cement Limited	37.65	1.3%	-0.5%	0.10	Nation Media Group	18.15	-1.1%	17.5%	0.20
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	11.70	12.00	-2.5%	1.43	Centum Investment Company Plc	14.20	14.00	1.4%	1.58
Total Kenya Ltd	25.70	27.50	-6.5%	0.14	Standard Chartered Bank Kenya Ltd	128.00	123.00	4.1%	2.93
Equity Group Holdings Plc	51.00	55.00	-7.3%	1.71	Kengen Limited	4.10	3.90	5.1%	0.79
The Cooperative Bank of Kenya Ltd	12.90	14.05	-8.2%	0.63	Kenya Reinsurance Corporation Ltd	2.24	2.10	6.7%	0.19
NCBA Group Plc	26.00	29.00	-10.3%	0.48	Diamond Trust Bank Limited	59.50	54.00	10.2%	0.37

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
International Company for Water and Power Projects	84.00	5.4%	15.4%	334.34	Saudi Arabian Fertilizer Co.	102.40	-9.9%	27.0%	14.48
Saudi Research and Marketing Group	196.20	4.9%	149.9%	75.07	Saudi Cable Co.	19.52	-2.3%	-34.4%	4.82
Allied Cooperative Insurance Group	23.60	4.2%	-62.4%	24.82	Zamil Industrial Investment Co.	27.75	-1.9%	33.7%	23.42
Walaa Cooperative Insurance Co.	18.98	3.3%	-13.4%	2.11	Alinma Tokio Marine Co.	31.40	-1.7%	28.8%	11.60
Derayah REIT Fund	12.70	3.3%	13.4%	4.68	Raydan Food Co.	20.20	-1.6%	-38.8%	10.34
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 Co.	282.40	282.40	0.0%	55.03	Allied Cooperative Insurance Group	23.60	23.60	0.0%	24.82
International Company for Water and Power Projects	84.00	84.00	0.0%	334.34	Fawaz Abdulaziz Alhokair Co.	15.56	15.56	0.0%	32.28
The Saudi National Bank	64.40	64.40	0.0%	116.44	Savola Group	31.95	31.95	0.0%	19.69
Zamil Industrial Investment Co.	27.75	27.75	0.0%	23.42	Tanmiah Food Co.	82.10	82.10	0.0%	17.80
United Electronics Co.	135.40	135.40	0.0%	10.78	BinDawood Holding Co.	95.80	95.80	0.0%	4.24

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields Ltd	17427.00	3.2%	26.7%	14751.35	Sasol Ltd	26131.00	-2.1%	95.1%	23871.24
AngloGold Ashanti Ltd	32367.00	3.0%	-5.5%	13452.79	Naspers Ltd	243688.00	-0.8%	-19.3%	116776.26
Absa Group Ltd	15500.00	2.0%	29.3%	12611.02	Impala Platinum Holdings Ltd	21902.00	-0.6%	8.5%	33782.70
FirstRand Ltd	6099.00	2.0%	19.5%	32847.36	Exxaro Resources Ltd	15552.00	-0.2%	15.5%	5143.54
NEPI Rockcastle PLC	10752.00	1.9%	15.0%	6504.92	Woolworths Holdings Ltd/South Africa	5223.00	-0.2%	32.1%	9235.90
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)
British American Tobacco PLC	59095.00	59248.00	-0.3%	20661.86	SPAR Group Ltd/The	16802.00	15842.00	6.1%	7445.52
Clicks Group Ltd	31975.00	32086.00	-0.3%	12360.99	Naspers Ltd	243688.00	229087.00	6.4%	116776.26
Shoprite Holdings Ltd	21149.00	21306.00	-0.7%	11143.30	Sibanye Stillwater Ltd	4974.00	4479.00	11.1%	21838.48
Glencore PLC	8149.00	8225.00	-0.9%	7951.23	Vodacom Group Ltd	13548.00	12150.00	11.5%	8561.13
Capitec Bank Holdings Ltd	203432.00	205500.00	-1.0%	26097.68	Reinet Investments SCA	28818.00	25623.00	12.5%	8118.43

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	52600.00	5.9%	136.4%	873454.56	PetroVietnam Power Corp	17450.00	-3.1%	30.4%	414770.80
Sai Gon Thuong Tin Commercial	30500.00	3.4%	80.5%	797797.65	Khang Dien House Trading & Investment	52100.00	-1.7%	95.6%	115141.00
Vietnam Prosperity	35400.00	1.9%	96.1%	337333.68	Tien Phong Commercial Joint Stock Bank	40750.00	-1.5%	105.3%	131467.65
Phat Dat Real Estate Development Corp	94400.00	1.5%	125.2%	319987.68	Vietcombank	78400.00	-1.4%	3.4%	72151.52
Vietjet Aviation	126000.00	0.6%	0.8%	111106.80	Vietnam JSC Bank	33800.00	-1.0%	29.4%	212578.34
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	171500.00	175000.00	-2.0%	873518.10	Vinamilk	85300.00	82573.01	3.3%	76181.43
Tien Phong Commercial Joint Stock Bank	40750.00	42450.00	-4.0%	131467.65	Saigon Beer Alcohol Beverage Corp.	148900.00	139800.00	6.5%	12224.69
Khang Dien House Trading & Investment	52100.00	54800.00	-4.9%	115141.00	Vingroup JSC	95000.00	82222.23	15.5%	157928.00
Phat Dat Real Estate Development Corp	94400.00	99800.00	-5.4%	319987.68	Vietcombank	78400.00	66193.28	18.4%	72151.52
Mobile World Inv. Corp	134300.00	145500.00	-7.7%	111831.61	BaoViet Holdings	55100.00	46340.17	18.9%	37236.58

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