

Daily Market Report

05 January 2022

JSE

JSE All-Share Index jumped by 1.80% to close at 75,052.06 points on Tuesday, as Industrial, Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 201.33 points, down by 0.37% on Tuesday with BICI Côte d'Ivoire & Bollore Transport & Logistics being the top losers.

NSE

NSE All-Share Index increased by 0.73% to close at 43,026.23 points on Tuesday, as Industrial and Banking sectors recorded gains.

EGX

EGX 30 Index increased 0.72% to close at 11,982.61 points on Tuesday, as the market gained LE 4.94 billion of market cap, amid Arab purchases.

ESG

Casablanca ESG 10 Index decreased by 0.14% to close at 992.40 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange ▲ 1.80%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.37%

NSE Nigerian Stock Exchange ▲ 0.73%

EGX Egyptian Stock Exchange ▲ 0.72%

ESG Casablanca Stock Exchange ▼ 0.14%

African Markets

Nigeria: NSE 30 Index rose by 1.10% and closed at 1,741.29 points on Tuesday. BUA Cement and Stanbic IBTC were the top gainers.

Egypt: EGX 30 Index increased 0.72% to close at 11,982.61 points on Tuesday, as the market gained LE 4.94 billion of market cap, amid Arab purchases.

Kenya: NSE 20 Index was up by 0.17% and closed at 1,917.50 points on Tuesday. Safaricom and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index surged 2.05% to close at 68,399.00 points on Tuesday, as Industrial, Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 413.67
INTERBANK RATES	
OPR	6.67 ▼
Overnight	7.50 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.65% to close at 8,409.70 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE decreased 0.65% to close at 448.52 points.

Vietnam: VN-30 Index jumped 1.51% to close at 1,558.87 points on Tuesday, as the blue-chip companies recorded gains. MSCI Vietnam advanced by 1.23% to close at 1090.29 points.

Saudi Arabia: Tadawul All Share Index increased 0.26% to close at 11,356.80 points on Tuesday, as gains in the Media & Publishing, Agriculture & Food and Industrial Investment sectors led shares higher. MSCI Saudi Arabia increased by 0.20% to close at 1,577.60 points.

India: Nifty 50 Index rose 1.02% to close at 17,805.25 points on Tuesday, as gains in the Power, Public Sector Undertakings and Banking sectors led shares higher. MSCI India increased by 0.85% to close at 2,080.24 points.

News

Nigeria:

Banking Industry Credit Rises to N23.5trn as MFBs, OFIs Disbursed N2.8tr Loans
Nigeria's crude oil earnings hit N12.4tn in 11 months
PFAs invest additional N693bn pension funds in banks

Kenya:

December Inflation Dips to 5.7%, Driven by Lower Food and Fuel Prices
Kenya's foreign wealth declines by Sh87 billion
Dar turns tables on Kenya as trade deficit hits Sh9bn

Abu Dhabi:

Oil prices jump as Opec+ agrees to continue oil output increase in Feb
Alpha Dhabi acquires 25% Al Qudra Holding stake as part of \$2.17bn investment push
Abu Dhabi regulator teams up with Etisalat & Trend Micro to boost cyber security

Saudi Arabia:

Saudi non-oil private sector growth slows on Omicron concerns - PMI
Albilad Capital announces dividend distribution to Sukuk Fund's unitholders
Zain, Tāta Communications seal Saudi

Egypt:

Egypt's PMI records 49 in December
Egypt, Italy discuss bilateral cooperation in oil, gas sector
EFG Hermes completes 6th issuance of securitization bonds worth LE170M

South Africa:

Adapt IT delists as Volaris takes control for R616m
Rand crashes through R16/\$, gold takes knock
Ramaphosa Receives First Part of South Africa Graft Probe Report

India:

RBI may delay rate hikes as Omicron might derail economic activity
Banks see revival in credit growth in December quarter
India's spends record \$55.7 billion on gold imports in 2021

Vietnam:

State budget collection estimated at almost US\$62 billion for 2022
3.74 billion USD of FDI poured into HCM City
HCM City to earmark \$24.9 bn for housing development by 2025

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,409.70	-0.6%	-0.9%	-0.9%	-0.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,982.61	0.7%	0.3%	0.3%	0.3%	EGP/USD	15.73	-0.1%	0.1%
India	17,805.25	1.0%	2.6%	2.6%	2.6%	INR/USD	74.56	0.4%	0.3%
Kenya	1,917.50	0.2%	0.8%	0.8%	0.8%	KES/USD	113.15	0.0%	0.0%
Nigeria	1,741.29	1.1%	1.1%	1.1%	1.1%	NGN/USD	413.75	0.0%	0.0%
Saudi Arabia	11,356.80	0.3%	0.7%	0.7%	0.7%	SAR/USD	3.76	0.0%	0.0%
South Africa	68,399.00	2.0%	2.0%	2.0%	2.0%	ZAR/USD	15.97	0.5%	0.1%
Vietnam	1,558.87	1.5%	1.5%	1.5%	1.5%	VND/USD	22,754.50	-0.2%	-0.2%

MSCI Emerging Markets

MSCI Frontier	672.04	1.0%	1.0%	1.0%	1.0%	Brent Crude (\$)	80.00	1.3%	2.9%
MSCI Frontier 100	1,550.88	1.1%	1.1%	1.1%	1.1%	Gold (\$)	1,814.60	0.8%	-0.8%
MSCI Emerging	1,234.95	0.1%	0.2%	0.2%	0.2%	Copper (\$)	9,768.00	0.5%	0.5%
MSCI World (USD)	3,248.12	0.2%	0.5%	0.5%	0.5%	Coffee (\$)	196.55	-2.0%	64.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.79	9.7%	9.7%	13.52	UACN	9.00	-5.3%	-5.3%	4.17
BUA Cement	71.95	7.3%	7.3%	128.10	FCMB	2.85	-4.7%	-4.7%	10.16
Stanbic IBTC	38.00	5.6%	5.6%	44.83	Nigerian Breweries	48.00	-4.0%	-4.0%	233.11
Ecobank	8.90	2.3%	2.3%	11.33	Dangote Sugar	16.95	-2.6%	-2.6%	24.65
Flour Mills	29.00	2.3%	2.3%	9.22	UBN	5.80	-1.7%	-1.7%	10.11
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%	4.08	Nascon	13.20	12.90	2.3%	0.61
Nestle	1556.50	1556.50	0.0%	15.34	Nigerian Breweries	48.00	45.45	5.6%	233.11
Airtel Africa	955.00	955.00	0.0%	4.37	FCMB	2.85	2.66	7.1%	10.16
United Capital Plc	9.95	10.00	-0.5%	5.70	Cap	19.45	18.00	8.1%	3.91
Presco	87.80	89.00	-1.3%	3.14	Sterling	1.53	1.40	9.3%	4.62

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ESG EMIRATES STALLIONS GROUP P.J.S.C	8.09	3.7%	1.1%	13.06	ZEE STORE PRJSC	26.00	-5.8%	-5.5%	19.39
Manazel PJSC	0.54	3.2%	3.8%	11.40	RESPONSE PLUS HOLDING	9.03	-5.0%	-6.4%	0.92
National Marine Dredging	13.78	2.8%	5.7%	37.48	Abu Dhabi Ship Building	3.89	-3.0%	-2.8%	0.27
FERTIGLOBE PLC	3.55	0.6%	0.9%	23.86	Al Qudra Holding	4.33	-2.9%	-4.2%	7.90
Eshraq Investments	0.36	0.6%	2.3%	18.81	Agthia Group	5.00	-2.5%	-2.9%	2.56
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	National Bank of Fujairah	5.00	4.98	0.4%	0.00
Al Buhaira Ntl Ins.	1.90	1.90	0.0%	0.00	Ooredoo QPSC	6.90	6.59	4.7%	3.29
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Gulf Medical Projects	1.70	1.62	4.9%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Sudatel Telecom	0.34	0.32	5.0%	0.12
Union Insurance Co	0.72	0.72	0.0%	0.00	Abu Dhabi National Oil Co.	4.22	3.84	9.9%	38.04

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian Kuwaiti Holding	21.14	7.4%	7.6%	11.78	Cleopatra Hospital Company	5.02	-1.4%	2.0%	2.97
Alexandria Mineral Oils Company	3.99	6.4%	9.0%	49.40	Ezz Steel	14.60	-1.4%	-2.6%	9.91
Raya Holding For Financial Investments	2.53	5.9%	6.3%	10.33	Orascom Development	5.71	-0.9%	-4.8%	6.02
Cairo For Investment And Real Estate Development Tenth Of Ramadan	13.82	3.4%	1.5%	2.23	Gadwa For Industrial Devp	1.04	-0.6%	-2.2%	0.81
Pharmaceutical Industries & Diagnostic-Rameda	2.58	3.2%	7.5%	16.76	Eastern Company	10.60	-0.5%	-1.1%	12.83
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	16.91	16.98	-0.4%	19.96	Eastern Company	10.60	10.34	2.5%	12.83
Commercial International Bank(Egypt)	52.80	54.15	-2.5%	57.99	Gadwa For Industrial Development	1.04	0.95	9.6%	0.81
T M G Holding	9.24	9.49	-2.6%	29.25	Citadel Capital - Common Shares	1.26	1.09	15.3%	18.18
Egyptian Financial Group-HermesHolding Company	14.84	15.25	-2.7%	10.17	Abou Kir Fertilizers	21.30	17.90	19.0%	12.35
GB AUTO	4.99	5.17	-3.5%	6.54	Aspire Capital Holding	0.29	0.24	20.4%	1.24

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	132.50	5.2%	6.5%	4455.661	Tata Motors	489.35	-1.7%	1.4%	11811.41
ONGC	148.30	3.7%	4.1%	2406.01	Coal India	153.00	-1.5%	4.8%	2119.94
State Bank Of India	483.75	2.8%	5.1%	11179.84	Tata Consumer products Ltd.	739.00	-1.2%	-0.6%	1735.31
Power Grid Corp Of India	210.40	2.6%	2.9%	2331.38	Sun Pharma Industries	838.90	-1.2%	-0.8%	2542.02
Reliance Industries	2460.00	2.3%	3.9%	12201.47	Shree Cement limited	26950.00	-1.1%	-0.1%	705.72
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Asian Paints	3454.25	3505.00	-1.4%	2721.36	HDFC Life Insurance Company	652.50	627.00	4.1%	1494.12
Larsen & Toubro	1937.50	1981.75	-2.2%	3173.93	Hero Motocorp	2484.95	2310.00	7.6%	451.10
Wipro	722.00	739.85	-2.4%	3673.01	Bharat Petroleum	385.60	357.40	7.9%	2290.13
Sun Pharma Industries	838.90	860.05	-2.5%	2542.02	Bajaj Auto	3294.95	3027.05	8.9%	806.63
Tata Consultancy Svs.	3878.70	3989.90	-2.8%	9604.25	Britannia Inds.	3641.00	3317.30	9.8%	1150.97

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	39.05	2.4%	2.9%	160.70	Bamburi Cement Limited	37.75	-1.2%	-0.7%	0.74
Nation Media Group	20.00	1.3%	8.4%	0.02	KCB Group Plc	45.05	-1.1%	-0.9%	73.07
Total Kenya Ltd	24.80	1.2%	-0.8%	0.02	Kengen Limited	4.15	-1.0%	-1.0%	0.16
Centum Investment Company Plc	14.80	1.0%	5.0%	0.00	The Cooperative Bank of Kenya Ltd	12.95	-0.4%	0.0%	0.69
Equity Group Holdings Plc	53.25	0.9%	0.9%	115.06	East African Breweries Limited	165.00	-0.3%	0.0%	14.39
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	11.80	12.00	-1.7%	1.02	Centum Investment Company Plc	14.80	14.00	5.7%	0.00
Equity Group Holdings Plc	53.25	55.00	-3.2%	115.06	Standard Chartered Bank Kenya Ltd	130.25	123.00	5.9%	9.81
The Cooperative Bank of Kenya Ltd	12.95	14.05	-7.8%	0.69	Kengen Limited	4.15	3.90	6.4%	0.16
Total Kenya Ltd	24.80	27.50	-9.8%	0.02	Kenya Reinsurance Corporation Ltd	2.30	2.10	9.5%	0.10
KCB Group Plc	45.05	50.75	-11.2%	73.07	Diamond Trust Bank Limited	59.75	54.00	10.6%	1.40

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Wafrah for Industry and Development Co.	150.00	10.0%	3.6%	195.93	Bank Albilad	47.90	-4.2%	3.3%	126.78
Saudi Research and Marketing Group	200.00	6.2%	1.9%	64.51	Allied Cooperative Insurance Group	21.30	-1.8%	-9.7%	5.19
Saudi Arabia Refineries Co.	137.20	5.2%	-0.3%	119.72	SABIC Agri-Nutrients Co	168.80	-1.6%	-4.4%	108.82
Middle East Paper Co.	46.20	4.8%	6.0%	30.57	Theeb Rent a Car Co	59.10	-1.5%	-3.0%	5.75
Tabuk Agricultural Development Co.	31.00	4.7%	3.7%	24.77	Banque Saudi Fransi	46.30	-1.5%	-2.0%	21.11
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.	276.40	276.40	0.0%	112.45	Allied Cooperative Insurance Group	21.30	21.30	0.0%	5.19
International Company for Water and Power Projects	84.60	84.60	0.0%	115.13	Fawaz Abdulaziz Alhokair Co.	15.62	15.62	0.0%	16.48
The Saudi National Bank	66.60	66.60	0.0%	130.97	Savola Group	31.75	31.75	0.0%	26.19
Zamil Industrial Investment	27.85	27.85	0.0%	17.52	Tanmiah Food Co.	82.00	82.00	0.0%	9.16
United Electronics Co.	140.00	140.00	0.0%	10.73	BinDawood Holding	96.20	96.20	0.0%	2.59

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	23349.00	6.2%	4.0%	21091.36	MTN Group	16980.00	-1.3%	-0.5%	32581.00
Impala Platinum Holdings Ltd	22889.00	4.8%	1.7%	33682.74	MultiChoice Group	12028.00	-1.3%	-1.4%	7392.61
Sibanye Stillwater Ltd	5121.00	4.3%	4.3%	30853.61	AngloGold Ashanti	32010.00	-1.1%	-2.6%	14865.64
Anglo American PLC	67220.00	4.2%	3.1%	47331.75	Shoprite Holdings	20757.00	-0.7%	-0.6%	16810.10
Glencore PLC	8429.00	3.7%	3.9%	28958.20	Sasol Ltd	26410.00	-0.6%	2.0%	18480.77
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)
Glencore PLC	8429.00	8434.00	-0.1%	28958.20	SPAR Group Ltd/The	16811.00	15842.00	6.1%	7498.60
British American Tobacco PLC	60300.00	60405.00	-0.2%	22023.55	Vodacom Group Ltd	13495.00	12150.00	11.1%	8604.87
Absa Group Ltd	15957.00	16009.00	-0.3%	14595.13	Naspers Ltd	257250.00	229087.00	12.3%	101687.07
Investec PLC	9051.00	9088.00	-0.4%	6482.07	Exxaro Resources	15984.00	14003.17	14.1%	7969.64
Investec Ltd	9004.00	9048.00	-0.5%	6423.94	Sibanye Stillwater	5121.00	4479.00	14.3%	30853.61

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	18700.00	6.9%	6.9%	382259.79	No Va Land Invest	89000.00	-2.2%	-2.2%	225721.80
Khang Dien House Trading & Investment	54400.00	6.7%	6.7%	165691.52	Vietjet Aviation	126000.00	-1.8%	-1.8%	86889.60
Vingroup JSC	101000.00	6.2%	6.2%	310181.10	Masan Group Corp	170000.00	-0.6%	-0.6%	169660.00
Petrovietnam Gas	101900.00	5.9%	5.9%	176317.57	Phat Dat Real Estate Development Corp	94800.00	-0.4%	-0.4%	338654.04
Tien Phong Commercial Joint Stock Bank	42750.00	4.1%	4.1%	471741.98	Asia Commercial JS Bank	34400.00	-0.3%	-0.3%	156692.00
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	54400.00	54800.00	-0.7%	165691.52	Vinamilk	86700.00	82573.01	5.0%	163481.52
Tien Phong Commercial Joint Stock Bank	42750.00	43250.00	-1.2%	471741.98	Saigon Beer Alcohol Beverage Corp.	157000.00	139800.00	12.3%	62062.10
Masan Group Corp	170000.00	175000.00	-2.9%	169660.00	Vietjet Aviation	126000.00	105800.00	19.1%	86889.60
PetroVietnam Power Corp	18700.00	19500.00	-4.1%	382259.79	Vietcombank	79000.00	66193.28	19.3%	89570.20
Phat Dat Real Estate Development Corp	94800.00	99800.00	-5.0%	338654.04	BaoViet Holdings	56900.00	46340.17	22.8%	35448.70

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