

Daily Market Report

17 January 2022

JSE

JSE All-Share Index fell by 1.01% to close at 75,160.19 points on Friday, as Industrial, Financial and Recourses sectors recorded losses.

BRVM

BRVM Composite Index closed at 204.11 points, down by 0.10% on Friday with Air Liquide Côte d'Ivoire and Sicable Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index decreased 0.34% to close at 44,454.67 points on Friday, as Insurance and Industrial sector recorded losses.

EGX

EGX 30 Index dropped by 1.51% to close at 11,830.94 points on Sunday, as the market lost LE 8.44 billion of market cap, amid Egyptian and Arab selling.

ESG

Casablanca ESG 10 Index rose by 1.42% to close at 1,030.05 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.01%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.10%
NSE Nigerian Stock Exchange	▼ 0.34%
EGX Egyptian Stock Exchange	▼ 1.51%
ESG Casablanca Stock Exchange	▲ 1.42%

African Markets

Nigeria: NSE 30 Index declined by 0.34% and closed at 1,735.17 points on Friday. Dangote Cement and Guaranty were the top losers.

Egypt: EGX 30 Index dropped by 1.51% to close at 11,830.94 points on Sunday, as the market lost LE 8.44 billion of market cap, amid Egyptian and Arab selling.

Kenya: NSE 20 Index increased by 0.75% and closed at 1,899.79 points on Friday. East African Breweries and Nation Media Group were the top gainers.

South Africa: JSE Top 40 Index fell by 1.07% to close at 68,448.13 points on Friday, as Industrial, Financial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 414.79
INTERBANK RATES	
OPR	14.00 ▲
Overnight	14.75 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched down 0.01% to close at 8425.40 points on Friday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE decreased 0.13% to close at 447.73 points.

Vietnam: VN-30 Index decreased 0.19% to close at 1,523.57 points on Friday, as the blue-chip companies recorded losses. MSCI Vietnam increased 0.30% to close at 1062.13 points.

Saudi Arabia: Tadawul All Share Index increased 0.26% to close at 12,110.15 points on Sunday, as gains in the Energy & Utilities, Cement and Transport sectors led shares higher. MSCI Saudi Arabia increased by 0.16% to close at 1,689.13 points.

India: Nifty 50 Index slipped 0.01% to close at 18,255.75 points on Friday, as losses in the Fast-Moving Consumer Goods, Healthcare and Auto sectors led shares lower. MSCI India decreased marginally by 0.05% to close at 2,133.28 points.

News

Nigeria:

Fed Govt gives Customs N4.1tr revenue target
Foreign inflows fall by 32%, UK, S'Africa, others slash Nigeria investments
Nigeria's debt stock hits N39.6tn in 11 months

Kenya:

Money circulation hits Sh238bn on recovery
KRA Records a Tax Collection Surplus of KSh 47.6 mn in H1 21/22
CBK Accepts KSh 31.1 bn at Weekly T-Bills Auction, a 156.4% Oversubscription

Abu Dhabi:

IHC subsidiary acquires 75% stake in Abu Dhabi Vegetable Oil Company
UAE banks to report robust results for full year 2021
New UAE regulations will support non-oil economy and boost FDI

Saudi Arabia:

Al Faisaliah Group's Tibbiyah Holding to offer 25% stake in IPO on Nomu
Saudi's Social Insurance office shakes-up stock market investments in 30 cos
Saudi ACWA Power starts works on \$300mIn Azerbaijan wind project

Egypt:

Investments to develop public sector oil companies in 22/23 budget reach LE30B
Suez Canal revenues to hike to \$7B by end of 2022
Egypt's exports exceed \$31B in 2021

South Africa:

Inflation expected to have quickened in December
Ascendis Health secures R550 million loan facility
Pepco delivers resilient results as it expands its store footprint

India:

WPI inflation eases to 13.6% in December
HDFC Bank net profit rises 18% to Rs 10,342 crore in Q3
Hero MotoCorp lines up Rs 420 crore fresh investment in Ather Energy

Vietnam:

Agro-forestry-fishery exports set new record of 48.6 billion USD
HEPZA aims to lure 500 million USD in investment this year
SeABank to offer over 181.3 million shares to shareholders

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,425.40	-0.01%	0.0%	-0.7%	-0.7%	AED/USD	3.67	0.0%	0.0%
Egypt	11,830.94	-1.5%	-1.5%	-0.7%	-0.7%	EGP/USD	15.69	-0.2%	-0.1%
India	18,255.75	-0.01%	0.0%	5.2%	5.2%	INR/USD	74.16	0.4%	-0.2%
Kenya	1,899.79	0.8%	0.0%	-0.1%	-0.1%	KES/USD	113.45	0.1%	0.3%
Nigeria	1,735.17	-0.3%	0.0%	0.7%	0.7%	NGN/USD	414.50	0.0%	0.2%
Saudi Arabia	12,110.15	0.3%	0.3%	6.9%	6.9%	SAR/USD	3.75	0.0%	0.0%
South Africa	68,448.13	-1.1%	0.0%	2.1%	2.1%	ZAR/USD	15.36	-0.2%	-3.8%
Vietnam	1,523.57	-0.2%	0.0%	-0.8%	-0.8%	VND/USD	22,715.00	0.1%	-0.3%

MSCI Emerging Markets

MSCI Frontier	661.48	0.1%	0.0%	-0.6%	-0.6%	Brent Crude (\$)	86.06	1.9%	10.6%
MSCI Frontier 100	1,520.78	-0.1%	0.0%	-0.8%	-0.8%	Gold (\$)	1,816.50	-0.3%	-0.7%
MSCI Emerging	1,257.46	-0.5%	0.0%	2.1%	2.1%	Copper (\$)	9,719.50	-2.4%	-0.01%
MSCI World (USD)	3,173.12	-0.3%	0.0%	-1.8%	-1.8%	Coffee (\$)	208.76	1.1%	5.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Julius Berger	22.80	3.6%	2.0%	8.54	Dangote Cement	270.00	-1.8%	5.1%	200.06
Sterling	1.57	3.3%	4.7%	12.48	Guaranty	25.20	-1.0%	-3.1%	445.50
United Capital PLC	11.10	1.8%	12.1%	32.57	Ecobank	8.60	-0.6%	3.0%	6.83
UBN	5.65	1.8%	-6.6%	2.19	Flour Mills	28.25	-0.2%	-0.4%	20.11
Nigerian Breweries	46.00	1.1%	-4.2%	122.31					
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%	6.74	Nigerian Breweries	46.00	45.45	1.2%	122.31
Guinness	42.20	42.20	0.0%	16.43	Nascon	13.10	12.90	1.6%	4.90
Airtel Africa	1050.50	1050.50	0.0%	10.07	Flour Mills	28.25	27.00	4.6%	20.11
P Z Cussons	7.15	7.20	-0.7%	0.80	Nestle	1435.00	1350.00	6.3%	4.78
Wema	0.89	0.90	-1.1%	0.36	Cap	19.50	18.00	8.3%	4.12

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Agthia Group	4.95	3.1%	-3.9%	1.16	Response Plus Holding	7.90	-6.8%	-18.1%	0.54
AL SEER MARINE SUPPLIES & EQUIPMENT CO	12.48	2.3%	-10.2%	24.08	Fujairah Cement Industries	0.58	-4.9%	-0.9%	0.00
CHIMERA	4.82	2.1%	1.9%	0.00	Abu Dhabi National for Building Materials	0.26	-3.7%	4.4%	0.00
RAK Properties PJSC	0.83	2.1%	7.4%	22.72	Foodco Holding	3.15	-3.1%	-3.1%	0.24
Chimera S&P Uae Shariah	6.57	0.8%	0.3%	0.02	Sharjah Cement	0.71	-2.9%	-7.8%	0.00
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)
Al Buhaira Ntl Ins.	2.00	2.00	0.0%	0.00	Gulf Cement	0.67	0.63	6.0%	0.00
Insurance House	0.89	0.89	0.0%	0.00	Agthia Group	4.95	4.65	6.5%	0.00
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Sudatel Telecom	0.34	0.32	6.9%	0.00
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Abu Dhabi National Energy	1.24	1.15	7.8%	0.00
Union Insurance Co	0.72	0.72	0.0%	0.00	Abu Dhabi National Oil Co.	4.22	3.84	9.9%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
MM Group For Industry And International Trade	7.94	2.3%	15.4%	28.55	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.35	-4.9%	-2.1%	3.80
Alexandria Mineral Oils Company	4.08	1.5%	11.5%	22.07	Fawry For Banking Technology And Electronic Payment	12.19	-4.8%	-4.8%	38.81
Egyptian Financial Group-Hermes Holding Company	14.84	0.2%	0.2%	11.19	Raya Holding For Financial Investments	2.59	-3.7%	8.8%	2.71
					T M G Holding	8.79	-3.0%	-3.1%	20.17
					Speed Medical	1.10	-2.9%	-13.5%	21.23
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£)
Commercial International Bank(Egypt)	53.00	54.15	-2.1%	38.62	Eastern Company	10.61	10.34	2.6%	1.44
Telecom Egypt	16.90	17.55	-3.7%	3.91	Gadwa For Industrial Devp	1.00	0.95	4.7%	0.62
Egyptian Financial Group-Hermes Holding Company	14.84	15.45	-3.9%	11.19	Citadel Capital - Common Shares	1.19	1.09	9.4%	4.33
Credit Agricole Egypt	8.14	8.62	-5.6%	0.70	Speed Medical	1.10	0.96	14.8%	21.23
T M G Holding	8.79	9.49	-7.4%	20.17	Pioneers Properties For Urban Devp (PREDCO)	2.58	2.22	16.2%	1.69

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Consumer products Ltd.	760.80	4.2%	2.3%	6651.490	Asian Paints	3364.00	-2.7%	-0.6%	5247.44
Indian Oil	123.30	1.8%	10.6%	1842.63	Axis Bank	721.25	-2.6%	6.3%	11776.49
Tata Consultancy Svs.	3965.35	1.7%	6.1%	13138.87	UPL	823.35	-2.1%	10.2%	3047.17
Infosys	1925.00	1.5%	2.0%	14706.96	HUL	2364.50	-2.1%	0.2%	3789.90
Adani Ports And Sez.	783.50	1.5%	7.3%	7547.01	ONGC	160.90	-1.9%	13.0%	1878.43
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Infosys	1925.00	1933.00	-0.4%	14706.96	HDFC Life Insurance Company	670.50	627.00	6.9%	867.81
Tata Consultancy Svs.	3965.35	3989.90	-0.6%	13138.87	Hero Motocorp	2566.00	2310.00	11.1%	686.41
SBI Life Insurance	1260.90	1273.90	-1.0%	1132.78	Bharat Petroleum	398.60	357.40	11.5%	1374.04
Sun Pharma Industries	857.50	871.00	-1.5%	2026.57	HUL	2364.50	2120.00	11.5%	3789.90
Grasim Industries	1855.00	1893.00	-2.0%	2285.69	Britannia Inds.	3700.00	3317.30	11.5%	361.44

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	158.25	4.5%	-4.1%	21.47	Total Kenya Ltd	24.35	-1.8%	-2.6%	0.28
Nation Media Group	19.25	3.8%	4.3%	0.03	Stanbic Holdings	87.25	-1.4%	0.0%	0.10
The Cooperative Bank of Kenya Ltd	12.95	3.2%	0.0%	0.61	Safaricom Plc	37.85	-0.3%	-0.3%	76.04
Kenya Power & Lighting Limited	1.69	1.2%	-3.4%	0.80	Kengen Limited	4.14	-0.2%	-1.2%	0.62
NCBA Group Plc	26.00	1.2%	3.2%	0.67	Nairobi Securities Exchange Plc	8.34	-0.2%	4.3%	0.03
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	11.85	12.00	-1.3%	1.42	Standard Chartered Bank Kenya Ltd	129.50	123.00	5.3%	3.56
The Cooperative Bank of Kenya Ltd	12.95	14.05	-7.8%	0.61	Centum Investment Company Plc	14.80	14.00	5.7%	0.16
Equity Group Holdings Plc	49.50	55.00	-10.0%	1.84	Kengen Limited	4.14	3.90	6.2%	0.62
NCBA Group Plc	26.00	29.00	-10.3%	0.67	East African Breweries Limited	158.25	148.00	6.9%	21.47
KCB Group Plc	45.15	50.75	-11.0%	3.65	Kenya Reinsurance Corporation Ltd	2.27	2.10	8.1%	0.38

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	103.80	10.0%	23.6%	506.04	Saudi Research and Marketing Group	229.00	-2.6%	16.7%	69.31
Saudi Tadawul Group Holding Co.	151.20	7.7%	20.2%	538.46	Mouwasat Medical Services Co.	191.20	-2.4%	10.0%	17.21
Filing and Packing Materials Manufacturing Co.	58.10	4.5%	10.2%	39.54	Arabia Insurance Cooperative Co.	38.10	-1.8%	-3.7%	6.38
Saudi Re for Cooperative Reinsurance Co.	18.26	4.5%	10.0%	26.25	Arabian Shield Cooperative Insurance Co.	24.06	-1.8%	-4.9%	39.00
Saudi Advanced Industries Co.	50.40	3.7%	6.1%	161.90	Saudi Investment Bank	21.62	-1.7%	10.5%	65.44
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)
Saudi Tadawul Group Holding Co.	151.20	151.20	0.0%	538.46	Allied Cooperative Insurance Group	20.84	20.84	0.0%	2.27
Development Works Food Co.	282.80	282.80	0.0%	44.10	Savola Group	34.20	34.20	0.0%	26.05
International Company for Water and Power Projects	103.80	103.80	0.0%	506.04	BinDawood Holding Co.	97.10	97.10	0.0%	17.08
The Saudi National Bank	72.00	72.00	0.0%	183.87	Nayifat Finance Co.	32.55	32.55	0.0%	59.79
Zamil Industrial Investment Co.	30.10	30.10	0.0%	57.85	Almunajem Foods Co.	60.00	60.00	0.0%	56.61

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
British American Tobacco PLC	63600.00	1.7%	8.5%	32791.52	Anglo American Platinum Ltd	179240.00	-3.8%	-1.3%	26768.06
Discovery Ltd	14833.00	1.6%	3.3%	17909.81	Impala Platinum Holdings Ltd	22453.00	-3.8%	-0.2%	41108.28
Old Mutual Ltd	1439.00	1.3%	9.8%	17765.91	Northam Platinum Ltd	21334.00	-3.3%	1.8%	15895.41
MTN Group	16420.00	0.5%	-3.8%	59343.98	Mondi PLC	39469.00	-2.4%	-0.1%	12682.34
Exxaro Resources Ltd	17254.00	0.4%	12.9%	9815.52	Gold Fields Ltd	16398.00	-2.0%	-5.8%	23373.84
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	63600.00	63600.00	0.0%	32791.52	SPAR Group Ltd/The	17011.00	15842.00	7.4%	12006.19
Capitec Bank Holdings Ltd	217370.00	219608.00	-1.0%	37176.79	Vodacom Group Ltd	13585.00	12177.00	11.6%	14310.33
Glencore PLC	8517.00	8625.00	-1.3%	21495.90	Mondi PLC	39469.00	35274.00	11.9%	12682.34
FirstRand Ltd	6450.00	6538.00	-1.3%	44440.30	Naspers Ltd	260643.00	229087.00	13.8%	99934.18
Standard Bank Group Ltd	14768.00	14978.00	-1.4%	29505.90	Prosus NV	136335.00	113890.83	19.7%	70077.83

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	17700.00	4.7%	1.1%	386589.24	No Va Land Invest	82000.00	-1.8%	-9.9%	251805.60
Sai Gon Thuong Tin Commercial	35000.00	2.0%	11.1%	934423.00	Techcombank	49750.00	-1.5%	-0.5%	258058.23
Vinamilk	84700.00	1.9%	-0.3%	213156.02	Vietnam Prosperity	34850.00	-1.1%	-2.7%	240886.69
Vietcombank	83400.00	1.8%	5.8%	126943.14	Mobile World Inv. Corp	134000.00	-1.1%	-1.4%	62765.60
Vincom Retail	34400.00	1.8%	14.3%	190895.92	Vietnam Rubber Group JSC	46250.00	-1.0%	-0.3%	365467.50
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Bank for Inv. and Devp	44250.00	45100.00	-1.9%	144493.95	Vinamilk	84700.00	81216.17	4.3%	213156.02
Sai Gon Thuong Tin Commercial	35000.00	36200.00	-3.3%	934423.00	Saigon Beer Alcohol Beverage Corp.	151900.00	138014.61	10.1%	12212.76
Tien Phong Commercial Joint Stock Bank	41900.00	44000.00	-4.8%	233232.16	Vietjet Aviation	122000.00	105800.00	15.3%	71418.80
Khang Dien House Trading & Investment	53500.00	57500.00	-7.0%	64216.05	BaoViet Holdings	54200.00	46340.17	17.0%	29414.34
Mobile World Inv. Corp	134000.00	145500.00	-7.9%	62765.60	Vingroup JSC	98900.00	82222.23	20.3%	100620.86

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