

Daily Market Report

18 January 2022

JSE

JSE All-Share Index increased 0.58% to close at 75,593.50 points on Monday, as Industrial and Recourses sectors recorded gains.

BRVM

BRVM Composite Index closed at 202.83 points, down by 0.63% on Monday with Bank of Africa - Burkina Faso and Safca Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index was down by 0.12% to close at 44,399.66 points on Monday, as Insurance and Banking sectors recorded losses.

EGX

EGX 30 Index increased 0.24% to close at 11,859.12 points on Monday, as the market gained LE 517.83 million of market cap, amid Egyptian and foreign buying.

ESG

Casablanca ESG 10 Index decreased by 0.44% to close at 1,025.54 points on Monday.

African Markets

Nigeria: NSE 30 Index increased by 0.19% and closed at 1,738.41 points on Monday. Nigerian Breweries and BUA Cement were the top gainers.

Egypt: EGX 30 Index increased 0.24% to close at 11,859.12 points on Monday, as the market gained LE 517.83 million of market cap, amid Egyptian and foreign buying.

Kenya: NSE 20 Index declined by 0.48% and closed at 1,890.59 points on Monday. NCBA Group and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index increased 0.64% to close at 68,889.25 points on Monday, as Industrial and Resources sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.58%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.63%

NSE

Nigerian Stock Exchange ▼ 0.12%

EGX

Egyptian Stock Exchange ▲ 0.24%

ESG

Casablanca Stock Exchange ▼ 0.44%

Nigeria Key Indicators

	Current
Inflation	15.40%
Exchange Rate	₦ 415.00
INTERBANK RATES	
OPR	14.50 ▲
Overnight	15.25 ▲

Other Emerging Markets

Abu Dhabi: ADX Index was down by 0.14% to close at 8,413.22 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE decreased 0.43% to close at 445.81 points.

Vietnam: VN-30 Index dropped by 2.95% to close at 1,478.61 points on Monday, as the blue-chip companies recorded losses. MSCI Vietnam plunged 3.05% to close at 1,029.78 points.

Saudi Arabia: Tadawul All Share Index increased 0.46% to close at 12,165.84 points on Monday, as gains in the Hotels & Tourism, Transport and Telecoms & IT sectors led shares higher. MSCI Saudi Arabia increased by 0.46% to close at 1,696.92 points.

India: Nifty 50 Index increased by 0.29% to close at 18,308.10 points on Monday, as gains in the Auto, Power and Real Estate sectors led shares higher. MSCI India increased by 0.42% to close at 2,142.27 points.

News

Nigeria:

After eight months of decline, Nigeria's inflation rate rises to 15.63%
Fed Govt to raise N471b from capital market in first quarter
Finance, insurance firms boost services sector growth – CBN

Kenya:

Kenya Enters Public Private Partnership to Develop Power Transmission Lines
Kenya Receives KSh115Million from UK to fight Drought and Floods
High dollar demand sends shilling to new all-time low

Abu Dhabi:

UAE & S. Korean export credit agencies in pact to boost green energy projects
Abu Dhabi utility companies TAQA, EWEC issue first \$700m green bonds
Abu Dhabi's Masdar to invest in green hydrogen programmes

Saudi Arabia:

World Bank favorably revises 2022 Saudi growth forecast to 4.9% on oil rebound
Two new firms to join Saudi Exchange's parallel market on Tuesday
Saudi SPIMACO to produce Swiss-firm's medical treatment amid \$64m deal

Egypt:

Egypt aims to reduce debt ratio within 3 years
Egypt reconstrues companies affiliated with armed forces to be offered on EGX
Egypt reveals plans to establish industrial cities in Eastern Desert, Sinai

South Africa:

November average house price inflation sits below inflation
SARB's proposed monetary policy implementation framework
Small business confidence plummets

India:

UltraTech Cement Q3 Profit rises to Rs 1,708 cr, beats estimate
Sebi tightens rules governing utilisation of IPO proceeds; tweaks OFS norms
India's 10-year bond yield hits 2-year high tracking US peers, crude

Vietnam:

Govt' to slash VAT from 10% to 8% in 2022
Rubber industry forecast to continue seeing bright prospects this year
Agricultural sector continues to be economy's pillar

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,413.22	-0.1%	-0.1%	-0.9%	-0.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,859.12	0.2%	-1.3%	-0.4%	-0.4%	EGP/USD	15.71	0.1%	0.0%
India	18,308.10	0.3%	0.3%	5.5%	5.5%	INR/USD	74.24	0.1%	-0.1%
Kenya	1,890.59	-0.5%	-0.5%	-0.6%	-0.6%	KES/USD	113.45	0.0%	0.3%
Nigeria	1,738.41	0.2%	0.2%	0.9%	0.9%	NGN/USD	415.75	0.3%	0.5%
Saudi Arabia	12,165.84	0.5%	0.7%	7.4%	7.4%	SAR/USD	3.75	0.0%	-0.1%
South Africa	68,889.25	0.6%	0.6%	2.7%	2.7%	ZAR/USD	15.39	0.2%	-3.6%
Vietnam	1,478.61	-3.0%	-3.0%	-3.7%	-3.7%	VND/USD	22,730.00	0.1%	-0.3%

MSCI Emerging Markets

MSCI Frontier	654.05	-1.1%	-1.1%	-1.7%	-1.7%	Brent Crude (\$)	87.22	1.3%	12.1%
MSCI Frontier 100	1,500.82	-1.3%	-1.3%	-2.1%	-2.1%	Gold (\$)	1,814.60	-0.1%	-0.8%
MSCI Emerging	1,254.40	-0.2%	-0.2%	1.8%	1.8%	Copper (\$)	9,731.00	0.1%	-1.8%
MSCI World (USD)	3,176.19	0.1%	0.1%	-1.7%	-1.7%	Coffee (\$)	205.28	-1.1%	3.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	47.30	2.8%	-5.4%	298.02	Transnational Corporation	1.08	-5.3%	12.5%	42.50
BUA Cement	70.00	2.2%	4.4%	145.98	International Breweries	4.95	-3.9%	0.0%	2.50
Fidelity	2.65	1.9%	3.9%	27.44	P Z Cussons	7.00	-2.1%	14.8%	7.84
Ecobank	8.70	1.2%	0.0%	6.30	Sterling	1.55	-1.3%	2.6%	5.95
UACN	9.15	0.5%	-3.7%	10.18	UBA	8.15	-1.2%	1.2%	31.09
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%	10.07	Nascon	13.10	12.90	1.6%	1.38
Guinness	42.20	42.20	0.0%	19.82	Nigerian Breweries	47.30	45.45	4.1%	298.02
Airtel Africa	1050.50	1050.50	0.0%	1.81	Flour Mills	28.25	27.00	4.6%	6.95
Wema	0.89	0.90	-1.1%	2.70	Nestle	1435.00	1350.00	6.3%	41.69
Presco	87.80	89.00	-1.3%	8.43	Cap	19.50	18.00	8.3%	0.59

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Foodco Holding	3.30	4.8%	1.5%	0.02	Abu Dhabi National Takaful	5.11	-7.9%	-17.0%	0.16
Sudatel Telecom	0.36	4.1%	2.3%	0.03	National Corp for Tourism and Hotels	2.60	-7.1%	-13.3%	0.01
PALMS SPORTS	12.22	3.7%	0.0%	4.78	Ras Al Khaimah Cement Investment Co	5.60	-6.7%	-16.4%	19.44
Sharjah Cement	0.73	3.1%	-5.0%	0.30	Response Plus Holding	7.60	-3.8%	-21.2%	2.11
Gulf Cement	0.68	1.5%	-2.9%	0.21	Eshraq Investments	0.33	-3.2%	-6.5%	4.60
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	Agthia Group	4.95	4.65	6.5%	4.22
Insurance House	0.89	0.89	0.0%	0.00	Abu Dhabi National Energy	1.23	1.15	7.0%	5.20
National Bank of Fujairah	5.00	5.00	0.0%	0.00	Gulf Cement	0.68	0.63	7.6%	0.21
Wahat Al Zaweya Holding PrJSC	4.07	4.07	0.0%	0.00	Abu Dhabi National Oil Co.	4.19	3.85	8.8%	58.48
Union Insurance Co	0.72	0.72	0.0%	0.00	Ooredoo QPSC	7.26	6.59	10.1%	44.64

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.48	5.5%	3.3%	18.59	MM Group For Industry And International Trade	7.69	-3.1%	11.8%	24.77
Raya Holding For Financial Investments	2.70	4.2%	13.4%	2.67	Cleopatra Hospital Company	5.00	-2.0%	1.6%	27.58
Speed Medical	1.14	3.3%	-10.7%	15.89	Egyptian Financial Group-Hermes	14.57	-1.8%	-1.6%	12.87
Heliopolis Housing	6.36	2.9%	-5.2%	22.78	GB AUTO	4.61	-1.7%	-9.6%	17.82
Palm Hills Development Company	1.86	2.2%	-6.8%	3.64	Egyptian for Tourism Resorts	1.37	-1.2%	-10.3%	2.59
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)	53.20	54.15	-1.8%	138.52	Eastern Company	10.80	10.34	4.4%	3.51
Telecom Egypt	16.87	17.55	-3.9%	0.48	Gadwa For Industrial Devp	1.00	0.95	4.5%	0.92
Egyptian Financial Group-Hermes	14.57	15.45	-5.7%	12.87	Citadel Capital - Common Shares	1.20	1.09	10.5%	2.37
Credit Agricole Egypt	8.11	8.62	-5.9%	0.64	Pioneers Properties For Urban Devp(PREDCO)	2.56	2.22	15.3%	0.87
T M G Holding	8.85	9.49	-6.7%	9.32	Aspire Capital Holding	0.28	0.24	16.7%	0.73

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	2701.00	5.1%	9.7%	6349.755	Hcl Technologies	1260.55	-5.7%	-4.4%	15091.01
Grasim Industries	1922.00	3.5%	18.5%	2370.32	Hdfc Bank	1523.50	-1.4%	3.0%	17593.42
ONGC	166.25	3.2%	16.7%	5410.85	Cipla	909.65	-1.3%	-3.6%	966.41
Tata Motors	524.80	2.9%	8.8%	14616.96	Axis Bank	712.60	-1.3%	5.0%	14035.39
Ultratech Cement	7870.00	2.7%	3.7%	9433.17	Britannia Inds.	3667.90	-1.2%	1.7%	624.75
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Grasim Industries	1922.00	1929.00	-0.4%	2370.32	HDFC Life Insurance Company	674.00	627.00	7.5%	845.34
SBI Life Insurance	1288.40	1293.25	-0.4%	1830.36	Britannia Inds.	3667.90	3317.30	10.6%	624.75
Tata Consultancy Svs.	4025.00	4043.00	-0.4%	13805.98	Bharat Petroleum	400.35	357.40	12.0%	1943.22
Infosys	1938.60	1953.90	-0.8%	10216.86	HUL	2390.50	2120.00	12.8%	2169.00
Maruti Suzuki India	8261.00	8368.90	-1.3%	7147.35	Dr Reddys Lab	4666.40	4135.00	12.9%	2510.36

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Standard Chartered Bank Kenya Ltd	131.25	1.4%	2.3%	0.70	NCBA Group Plc	24.45	-6.0%	-3.0%	0.45
Diamond Trust Bank Limited	59.75	1.3%	0.4%	0.79	Nairobi Securities Exchange Plc	8.00	-4.1%	0.0%	0.98
Centum Investment Company Plc	14.95	1.0%	6.0%	0.48	Nation Media Group	19.00	-1.3%	3.0%	0.04
WPP Scangroup Plc	4.16	0.7%	0.5%	0.04	Kenya Power & Lighting Limited	1.67	-1.2%	-4.6%	0.31
					Total Kenya Ltd	24.10	-1.0%	-3.6%	0.63
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%	2.28	Kengen Limited	4.12	3.90	5.6%	0.24
The Cooperative Bank of Kenya Ltd	12.95	14.05	-7.8%	4.45	Standard Chartered Bank Kenya Ltd	131.25	123.00	6.7%	0.70
Equity Group Holdings Plc	49.50	55.00	-10.0%	21.15	Centum Investment Company Plc	14.95	14.00	6.8%	0.48
KCB Group Plc	45.10	50.75	-11.1%	9.67	East African Breweries Limited	158.25	148.00	6.9%	0.27
Stanbic Holdings	87.25	99.00	-11.9%	1.67	Safaricom Plc	37.65	34.95	7.7%	159.11

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Tadawul Group Holding Co.	160.00	5.8%	27.2%	352.20	Mouwasat Medical Services Co.	186.20	-2.6%	7.1%	37.40
Arabian Internet and Communications Services Co.	213.00	5.3%	13.2%	344.31	AlAhli REIT Fund 1	11.90	-2.0%	4.4%	3.91
Tanmiah Food Co.	93.50	5.2%	13.9%	132.08	Saudi Arabian Mining Co.	91.00	-1.6%	15.9%	113.16
Almunajem Foods Co.	62.80	4.7%	8.1%	309.35	Dr. Sulaiman Al Habib Medical Services Group	167.40	-1.5%	3.7%	26.27
Nayifat Finance Co.	33.95	4.3%	7.9%	288.20	Saudi Enaya Coop Insurance Co.	30.75	-1.4%	-1.1%	8.66
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.	160.00	160.00	0.0%	352.20	Allied Cooperative Insurance Group	20.78	20.78	0.0%	1.53
Development Works Food	290.00	290.00	0.0%	100.16	Savola Group	34.45	34.45	0.0%	22.00
International Company for Water and Power Projects	104.00	104.00	0.0%	431.21	BinDawood Holding	97.00	97.00	0.0%	9.09
The Saudi National Bank	73.00	73.00	0.0%	206.11	Almunajem Foods	62.80	62.60	0.3%	309.35
Zamil Industrial Investment	30.10	30.10	0.0%	36.08	Nayifat Finance Co.	33.95	33.75	0.6%	288.20

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	66248.00	4.2%	13.1%	69307.13	Gold Fields Ltd	15883.00	-3.1%	-8.8%	21723.40
Woolworths Holdings Ltd/South Africa	5440.00	4.0%	4.9%	24407.01	Aspen Pharmacare Holdings Ltd	21993.00	-2.5%	-2.0%	13792.47
Cie Financiere Richemont SA	22920.00	3.2%	-5.0%	46571.70	AngloGold Ashanti	30431.00	-2.0%	-7.4%	19866.03
Mr Price Group Ltd	21051.00	2.8%	5.5%	25320.73	Discovery Ltd	14536.00	-2.0%	1.2%	13857.14
Glencore PLC	8644.00	1.5%	6.5%	19932.97	Capitec Bank Holdings Ltd	213100.00	-2.0%	4.5%	46768.84
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	66248.00	66248.00	0.0%	69307.13	SPAR Group Ltd/The	16890.00	15842.00	6.6%	15138.15
Glencore PLC	8644.00	8686.00	-0.5%	19932.97	Vodacom Group Ltd	13561.00	12177.00	11.4%	16103.67
FirstRand Ltd	6455.00	6538.00	-1.3%	42719.48	Mondi PLC	39816.00	35274.00	12.9%	13614.84
Anglo American PLC	70657.00	71601.00	-1.3%	60868.25	Naspers Ltd	261872.00	229087.00	14.3%	77231.81
Investec PLC	9047.00	9178.00	-1.4%	4985.78	Prosus NV	135481.00	113890.83	19.0%	82115.44

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietcombank	86200.00	3.4%	9.4%	226576.70	Saigon Securities Inc	45300.00	-7.0%	-12.5%	1465287.39
					Vincom Retail	32000.00	-7.0%	6.3%	349884.80
					Khang Dien House Trading & Investment	49800.00	-6.9%	-2.4%	124903.38
					Sai Gon Thuong Tin Commercial	32600.00	-6.9%	3.5%	1446488.08
					PetroVietnam Power Corp	16500.00	-6.8%	-5.7%	517001.10
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietcombank	86200.00	90735.11	-5.0%	226576.70	Vinamilk	82900.00	81216.17	2.1%	174123.16
Bank for Inv. and Devp	43650.00	47000.00	-7.1%	337899.02	Saigon Beer Alcohol Beverage Corp.	150000.00	138014.61	8.7%	27750.00
Tien Phong Commercial Joint Stock Bank	40200.00	44000.00	-8.6%	364561.74	BaoViet Holdings	52700.00	46340.17	13.7%	34075.82
Sai Gon Thuong Tin Commercial	32600.00	36200.00	-9.9%	1446488.08	Vietjet Aviation	120500.00	105800.00	13.9%	77638.15
Military Commercial Bank	29500.00	32925.94	-10.4%	868193.85	Vingroup JSC	97000.00	82222.23	18.0%	255003.30

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