

Daily Market Report

11 October 2022

JSE

JSE All-Share Index dropped by 1.38% and closed at 64,769.20 points on Monday, as Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index declined by 0.97% and closed at 201.77 points on Monday, with Sicom Côte d'Ivoire and Sicable Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index was closed on Monday on account of Eid-el-Maulud.

EGX

EGX 30 Index inched up by 0.08% and closed at 9,948.53 points on Monday, as the market gained LE 1.2 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 was closed on Monday on account of Eid-el-Maulud.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 1.38%

BRVM

Bourse Régionale des Valeurs Mobilières

▼ 0.97%

NGX

Nigerian Stock Exchange

↔ 0.00%

EGX

Egyptian Stock Exchange

▲ 0.08%

ESG

Casablanca Stock Exchange

↔ 0.00%

African Markets

Nigeria: NGX 30 Index was closed on Monday on account of Eid-el-Maulud.

Egypt: EGX 30 Index inched up by 0.08% and closed at 9,948.53 points on Monday, as the market gained LE 1.2 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index was closed on Monday on account of Utamaduni Day.

South Africa: JSE Top 40 Index dropped by 1.51% and closed at 58,385.40 points on Monday, as Industrial and Resources sectors recorded losses.

Nigeria Key Indicators

Current

Inflation	20.52%
Exchange Rate	₦ 434.78

INTERBANK RATES

OPR	16.25↔
Overnight	17.25↔

Other Emerging Markets

Abu Dhabi: ADX Index declined by 0.75% and closed at 9,830.84 points on Monday, as losses in the Utilities, Real Estate and Energy sectors pushed shares lower. MSCI UAE declined by 1.05% to close at 423.78 points.

Vietnam: VN-30 Index slipped by 0.06% to close at 1,038.93 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.39% to close at 676.72 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.31% to close at 11,530.37 points on Monday, as losses in the Pharma, Consumer Durables & Apparel and Consumer Services sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.38% to close at 1,601.77 points.

India: Nifty 50 Index decreased by 0.43% to close at 17,241.00 points on Monday, as losses in the Bank, Auto and Financial Services sectors pushed shares lower. MSCI India decreased by 0.44% to close at 2,011.84 points.

News

Nigeria:

FSDH, AGF sign N3.8bn to boost SME portfolio
Nigeria's non-oil export hits \$2.6bn in six months – NEPC
At 937,000bpd, 50% Drilling, Nigeria's Oil Production Sinks to 30-year Low

Kenya:

SBM inherited Sh12.5bn CBK boost in banks buy
Kenyans hold Sh905bn in dollars as shortage bites
Bonds turnover declines by 24pc on tight liquidity

Abu Dhabi:

UAE Cabinet approves \$68.7bn federal budget for 2023-26
ADNOC Drilling awarded \$1.53bn contract to expand ADNOC's offshore operations
UAE: Bilateral relations with Uganda boost FDI to \$3 billion in 2022

Saudi Arabia:

Saudi Arabia announces massive cut to oil production
Saudi Arabia's industrial production rises by 16.8% in August
Saudi Aramco to maintain full oil supplies to Asia in Nov despite OPEC+ cuts

Egypt:

Egypt annual headline inflation in September highest in four years: CAPMAS
Egypt's net FDI inflows hit nearly dlr 9 bln
Bayer to invest EGP 240 m in OTC drug production hub in Egypt

South Africa:

Germany commits R6.2 bn towards sustainability issues in SA
Strike crimping SA mining exports set to worsen
RMH shareholders to get a large dividend

India:

TCS Q2 business grows 15% amid rising global uncertainties
Inflation likely to hit five month high in Sept on food prices: Report
India's fuel demand slips to 10-month low in September

Vietnam:

Vietnam-Australia trade up over 33% in nine months
SBV collaborates with authorities to protect investors
Pessimistic outlook for tax collection towards year end

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,830.84	-0.8%	-0.8%	0.8%	15.8%	AED/USD	3.67	0.0%	0.0%
Egypt	9,948.53	0.1%	-0.6%	1.2%	-16.5%	EGP/USD	19.67	0.1%	25.2%
India	17,241.00	-0.4%	-0.4%	0.9%	-0.7%	INR/USD	82.32	0.0%	10.7%
Kenya	1,676.77	0.0%	0.0%	-2.4%	-11.9%	KES/USD	120.91	0.0%	6.9%
Nigeria	1,686.69	0.0%	0.0%	-3.4%	-2.1%	NGN/USD	435.52	0.1%	5.3%
Saudi Arabia	11,530.37	-0.3%	-1.9%	1.1%	1.8%	SAR/USD	3.76	0.0%	0.1%
South Africa	58,385.40	-1.5%	-1.5%	1.7%	-12.9%	ZAR/USD	18.13	0.2%	13.6%
Vietnam	1,038.93	-0.1%	-0.1%	-9.8%	-32.3%	VND/USD	23,891.00	0.0%	4.8%

MSCI Emerging Markets

MSCI Frontier	470.68	-0.1%	-0.1%	-1.8%	-29.3%	Brent Crude (\$)	96.19	-1.8%	23.7%
MSCI Frontier 100	1,096.57	-0.2%	-0.2%	-1.9%	-28.5%	Gold (\$)	1,675.20	-2.0%	-8.4%
MSCI Emerging	884.81	-1.4%	-1.4%	1.0%	-28.2%	Copper (\$)	7,578.50	1.6%	-22.8%
MSCI World (USD)	2,395.61	-0.9%	-0.9%	0.7%	-25.9%	Coffee (\$)	191.62	0.6%	-22.0%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	4.75	5.6%	1.1%	2.24	Nascon	9.50	-9.5%	-28.0%	5.57
Sterling	1.55	3.3%	3.3%	6.62	FCMB	3.10	-4.6%	4.0%	1.09
UBA	6.75	3.1%	-15.6%	31.83	Axamansard	1.63	-1.2%	-26.9%	0.83
Fidelity	3.50	2.9%	37.3%	10.02					
Zenith	19.55	1.3%	-21.8%	144.58					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.35	3.35	0.0%	4.24	Guaranty	16.95	16.95	0.0%	471.48
Transcorp Hotels	6.25	6.25	0.0%	0.00	Stanbic IBTC	28.20	24.50	15.1%	62.48
Total	211.10	211.10	0.0%	1.76	Cap	17.75	15.25	16.4%	0.36
Seplat Petroleum	1250.00	1250.00	0.0%	213.35	Nascon	10.50	9.00	16.7%	5.90
P Z Cussons	8.40	8.40	0.0%	0.38	Unilever	12.30	10.50	17.1%	0.53

*Market closed on 10/10

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easylease motorcycle rentals	40.96	9.2%	41.2%	9.46	Aram Group	2.37	-9.9%	-23.5%	0.01
National Corp for Tourism and Hotels	2.58	3.2%	-14.0%	0.39	Ghitha Holding P.J.S.C.	72.00	-4.1%	161.8%	32.42
Gulf Cement	0.52	2.6%	-26.4%	1.05	Multiply Group PJSC	3.24	-3.3%	76.1%	95.60
National Marine Dredging	24.70	2.1%	89.4%	29.18	GFH Financial Group B.S.C	0.92	-3.3%	-21.6%	0.38
Sudatel Telecom	0.35	2.0%	0.3%	0.07	Chimera S&P Kuwait Shariah Etf-Share	3.32	-2.9%	-10.0%	0.03
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.	2.30	2.30	0.0%	0.00	Al Khazna Insurance Co	1.00	0.00	0.0%	0.00
Sharjah Insurance	1.50	1.50	0.0%	0.00	National Bank of Fujairah	4.99	4.98	0.2%	0.00
Finance House	2.12	2.12	0.0%	0.00	Dana Gas PJSC	0.93	0.92	1.1%	3.22
International Holding	359.00	370.00	-3.0%	288.82	Palms Sports PJSC	9.19	9.00	2.1%	3.78
Abu Dhabi National Energy	2.52	2.67	-5.6%	14.73	First Abu Dhabi Bank	17.68	17.30	2.2%	53.47

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Sidi Kerir Petrochemicals - Sidpec	7.55	3.0%	-3.2%	25.45	Citadel Capital - Common Shares	1.38	-2.1%	14.1%	54.61
Housing & Development Bank	38.35	2.6%	-12.9%	14.95	Orascom Construction	63.00	-1.6%	-17.0%	1.48
Alexandria Containers And Goods	10.43	1.9%	24.2%	1.30	Ibnsina Pharma	1.79	-1.4%	-48.8%	3.07
Misr Fertilizers Production Company - Mopco	108.73	1.8%	11.5%	12.10	Heliopolis Housing	5.64	-1.1%	-15.9%	7.83
Palm Hills Development Company	1.36	1.0%	-31.8%	3.44	Oriental Weavers	6.63	-1.0%	-23.7%	4.11
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£)
Alexandria Containers And Goods	10.43	11.02	-5.4%	1.30	Cleopatra Hospital Company	3.89	3.82	1.8%	2.96
Alexandria Mineral Oils Company	4.24	4.48	-5.4%	6.10	Oriental Weavers	6.63	6.30	5.2%	4.11
Misr Fertilizers Production Company - Mopco	108.73	115.00	-5.5%	12.10	Eastern Company	10.52	9.53	10.4%	13.79
Tenth Of Ramadan Pharmaceutical Industries	2.75	2.96	-7.1%	0.24	T M G Holding	7.27	6.50	11.8%	13.23
Egyptian Kuwaiti Holding-Egp	23.01	25.50	-9.8%	20.10	Commercial International Bank	25.80	22.49	14.7%	219.69

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Axis Bank	778.70	3.0%	14.8%	10799.631	Tata Motors	396.55	-3.8%	-17.8%	13035.84
Tata Consultancy Svs.	3124.00	1.9%	-16.4%	9479.51	Tata Consumer Products Ltd.	758.70	-2.8%	2.1%	1775.91
HDFC Life Insurance Company Ltd	533.30	1.2%	-17.9%	1570.07	Hero Motocorp	2571.75	-2.0%	4.5%	2751.36
Wipro	412.90	1.2%	-42.3%	3806.52	Asian Paints	3280.00	-1.9%	-3.0%	2406.72
Eicher Motors	3538.00	1.1%	36.5%	1444.45	Itc	328.15	-1.8%	50.5%	3081.19
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	948.00	967.85	-2.1%	1593.66	Bharat Petroleum	304.50	293.35	3.8%	719.27
Cipla	1120.00	1150.40	-2.6%	1772.37	Tata Consultancy Svs.	3124.00	2926.10	6.8%	9479.51
Titan Company	2683.95	2768.00	-3.0%	3483.34	Hdfc Life Insurance Company Ltd	533.30	497.05	7.3%	1570.07
Bharti Airtel	791.30	816.75	-3.1%	2772.21	Wipro	412.90	384.60	7.4%	3806.52
Britannia Inds.	3812.00	3963.65	-3.8%	698.11	Infosys	1465.00	1355.00	8.1%	7643.64

Kenya*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Centum Investment Company Plc	24.75	4.7%	-27.7%	517.72	WPP Scangroup Plc	3.11	-2.8%	-48.2%	0.12
NCBA Group Plc	31.95	3.4%	19.4%	9.96	Kenya Power & Lighting Limited	1.84	-1.6%	7.6%	0.82
Centum Investment Company Plc	8.96	2.1%	-44.2%	0.06	British American Tobacco Kenya Ltd	433.50	-1.6%	20.1%	1.43
Stanbic Holdings	97.00	1.6%	14.1%	0.01	Kenya Reinsurance Corporation Ltd	1.98	-1.5%	-14.7%	0.19
The Cooperative Bank of Kenya Ltd	11.85	0.9%	-5.2%	0.99	Bamburi Cement Limited	32.75	-0.9%	-13.5%	0.26
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)
NCBA Group Plc	31.95	33.45	-3.9%	9.96	Diamond Trust Bank Limited	49.40	48.00	2.9%	0.14
Standard Chartered Bank Kenya Ltd	134.75	148.75	-9.4%	2.30	Kenya Reinsurance Corporation Ltd	1.98	1.92	3.1%	0.19
Total Kenya Ltd	23.75	26.40	-10.0%	0.07	Kengen Limited	3.47	3.35	3.6%	0.09
Stanbic Holdings	97.00	108.00	-10.2%	0.01	Bamburi Cement Limited	32.75	30.85	6.2%	0.26
British American Tobacco Kenya Ltd	433.50	512.00	-15.3%	1.43	Nation Media Group	16.55	15.40	7.5%	0.06

*Market closed on 10/10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Mobile Telecommunication Company Saudi Arabia	12.94	7.1%	7.5%	287.17	National Shipping Company Of Saudi Arabia	26.20	-3.7%	-19.3%	13.86
National Medical Care Co.	76.20	5.7%	21.7%	26.90	Saudi Re For Coop Reinsurance Co	14.60	-3.6%	-12.0%	3.93
Theeb Rent A Car Co	72.40	4.9%	18.9%	16.80	United Electronics	84.80	-3.1%	-37.4%	32.64
Saudi Ceramic Co.	41.60	4.4%	-24.5%	6.66	Umm Al-Qura Cement	19.48	-2.9%	-17.3%	21.45
Saudi Industrial Export Co.	41.25	4.0%	8.9%	83.16	Gulf Insurance Group	25.70	-2.8%	-22.4%	3.45
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)
Retal Urban Development Co.	137.20	137.20	0.0%	6.97	Alkhabeer Reit Fund	7.68	7.68	0.0%	1.30
Nahdi Medical Co.	192.20	192.20	0.0%	33.57	Allied Cooperative Insurance Group	13.36	13.36	0.0%	0.41
Elm Co.	318.80	318.80	0.0%	47.45	CHUBB Arabia Cooperative Insurance Co.	17.50	17.50	0.0%	2.69
Almunajem Foods Co.	69.80	69.80	0.0%	35.49	Gulf General Coop Insurance	8.77	8.77	0.0%	3.48
Saudi Tadawul Group Holding Co.	209.20	209.20	0.0%	16.63	Gulf Union Alahlia	8.79	8.79	0.0%	1.24

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mondi PLC	28276.00	3.6%	-28.4%	21771.36	Naspers Ltd	225791.00	-4.7%	-8.7%	145416.86
Growthpoint Properties Ltd	12304.00	2.7%	-19.5%	10500.48	Sibanye Stillwater Ltd	4236.00	-4.4%	-13.7%	30342.31
Vodacom Group Ltd	12304.00	0.9%	-8.6%	11957.45	Exxaro Resources Ltd	19711.00	-4.4%	28.9%	11042.97
Clicks Group Ltd	28295.00	0.7%	-10.3%	14906.12	Anglogold Ashanti Ltd	25432.00	-4.1%	-22.6%	13965.02
Shoprite Holdings Ltd	21638.00	0.6%	3.6%	22971.70	Prosus NV	93760.00	-4.0%	-28.4%	68486.90
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)
Glencore PLC	9886.00	10382.20	-4.8%	29414.14	Sanlam Ltd	5022.00	4925.00	2.0%	19920.99
Woolworths Holdings Ltd/South Africa	6132.00	6553.00	-6.4%	20399.53	MTN Group	11938.00	11665.00	2.3%	30879.96
British American Tobacco PLC	66623.00	73123.00	-8.9%	38236.41	Old Mutual Ltd	966.00	941.00	2.7%	8983.10
Absa Group Ltd	17606.00	19536.00	-9.9%	28518.18	Vodacom Group Ltd	12304.00	11929.00	3.1%	11957.45
Shoprite Holdings Ltd	21638.00	24723.00	-12.5%	22971.70	Discovery Ltd	10460.00	10073.00	3.8%	16203.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Mobile World Inv. Corp	57100.00	5.7%	-15.4%	223352.36	Tien Phong Commercial Joint	20800.00	-6.9%	-49.3%	49678.72
Vietnam National Petroleum Group	33500.00	5.3%	-37.8%	49750.85	Techcombank	25800.00	-5.3%	-48.4%	471505.32
Hoa Phat Group Jsc	18350.00	4.3%	-47.7%	459836.32	Vietjet Aviation	110000.00	-4.3%	-14.3%	59246.00
Vietnam Rubber Group Jsc	18350.00	4.3%	-47.7%	459836.32	No Va Land Invest	76400.00	-3.3%	-16.0%	189303.92
Petrovietnam Gas	106000.00	3.9%	13.2%	45686.00	Ho Chi Minh City Devp	16900.00	-3.2%	-31.5%	55800.42
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Saigon Beer Alcohol Beverage Corp.	184500.00	197900.00	-6.8%	39021.75	Tien Phong Commercial Joint	20800.00	20800.00	0.0%	49678.72
No Va Land Invest	76400.00	91000.00	-16.0%	189303.92	Vietjet Aviation	110000.00	109000.00	0.9%	59246.00
Petrovietnam Gas	106000.00	130442.43	-18.7%	45686.00	Vietcombank	65100.00	64100.00	1.6%	85736.70
Vinamilk	70500.00	87004.15	-19.0%	117163.95	Techcombank	25800.00	25350.00	1.8%	471505.32
Fpt Corp	74000.00	97944.43	-24.4%	120294.40	Vincom Retail	25400.00	24900.00	2.0%	44696.38

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