

# Daily Market Report

## 25 October 2022

### JSE

JSE All-Share Index declined by 0.86% and closed at 64,975.95 points on Monday, as Industrial sector recorded losses.

### BRVM

BRVM Composite Index decreased by 0.30% and closed at 200.29 points on Monday, with CFAO Motors Côte d'Ivoire and Tractafric Motors Côte d'Ivoire being the top losers.

### NSE

NGX All-Share Index was up by 0.15% to close at 44,461.63 points on Monday, as the Insurance, Industrials and Consumer Goods sectors recorded gains.

### EGX

EGX 30 Index increased by 0.61% and closed at 10,320.88 points on Monday, as the market gained LE 1 billion of market cap, amid Egyptian and foreign buying.

### ESG

Casablanca ESG 10 Index declined by 0.97% to close at 809.25 points on Monday.

## African Markets

**Nigeria:** NGX 30 Index was up by 0.11% and closed at 1,603.04 points on Monday. Lafarge Africa and MTNN were the top gainers.

**Egypt:** EGX 30 Index increased by 0.61% and closed at 10,320.88 points on Monday, as the market gained LE 1 billion of market cap, amid Egyptian and foreign buying.

**Kenya:** NSE 20 Index inched up by 0.03% and closed at 1705.08 points on Monday. Equity Group Holdings and Nation Media Group were the top gainers.

**South Africa:** JSE Top 40 Index dropped by 1.06% and closed at 58,461.97 points on Monday, as Industrial sector recorded losses.

## Capital Markets

**JSE**  
Johannesburg Stock Exchange ▼ 0.86%

**BRVM**  
Bourse Régionale des Valeurs Mobilières ▼ 0.30%

**NGX**  
Nigerian Stock Exchange ▲ 0.15%

**EGX**  
Egyptian Stock Exchange ▲ 0.61%

**ESG**  
Casablanca Stock Exchange ▼ 0.97%

## Nigeria Key Indicators

	Current
Inflation	20.77%
Exchange Rate	₦ 437.68
<b>INTERBANK RATES</b>	
OPR	16.33 ↔
Overnight	16.50 ↔

## Other Emerging Markets

**Abu Dhabi:** ADX Index decreased by 0.45% to close at 10,067.94 points on Monday, as losses in the Telecommunications, Industrials and Financials sectors pushed shares lower. MSCI UAE decreased by 0.61% to close at 426.37 points.

**Vietnam:** VN-30 Index fell by 3.63% to close at 973.88 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam fell by 3.35% to close at 632.92 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.57% to close at 12,075.27 points on Monday, as gains in the Media & Entertainment, Utilities and Software & Services sectors led shares higher. MSCI Saudi Arabia increased by 0.55% to close at 1,682.51 points.

**India:** Nifty 50 Index rose by 0.88% to close at 17,730.75 points on Monday, as gains in the Bank, Auto and Financial Services sectors led shares higher. MSCI India increased by 0.69% to close at 2,048.85 points.

## News

### Nigeria:

CBN okays dollar sales by Payment Service Banks  
UBA's Q3 gross earnings hit N608bn  
Contributory pension assets gain N1tn in eight months

### Kenya:

NSSF raises stake with Sh703 million KCB shares  
KCB Partners with TerraPay to Enhance Cross-border Remittances  
NHIF revives law raising premiums for top earners

### Abu Dhabi:

Mubadala, KKR to invest about \$1bn in Asia  
Abu Dhabi Commercial Bank's Q3 profit jumps 25% to \$432m  
ADQ invests \$125m in Aliph Capital's fund

### Saudi Arabia:

PIF launches Regional Voluntary Carbon Market Co.  
Saudi PIF Offers to Buy Stake in \$5.8 Billion STC Towers Unit  
Saudi CMA greenlights Shams' 1000% capital hike

### Egypt:

IFC makes total investments of \$5B in Egypt  
Egypt plans to lower budget deficit to 4%, descend debt to 72% in 5 years  
CBE plans to launch NDF contracts to hedge against currency fluctuations

### South Africa:

Oracle, Microsoft join hands in Johannesburg in cloud partnership  
Massmart shareholders vote in favour of delisting and their buyout by Walmart  
RBPlat falls in quarter knocked by unreliable Eskom power

### India:

Central bank raises selling price of USD to 24,870 VND  
VinFast gets 135 mn USD from ADB-mobilised green funding  
HCM City property retail market to recover

### Vietnam:

GDP Growth: India slips, but canters on  
Kotak Mahindra Bank Q2 profit rises 27% to Rs 2,581 crore  
India aims for 10% share in global exports by 2047

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,067.94	-0.5%	-0.5%	3.3%	18.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,320.88	0.6%	0.5%	6.5%	-13.3%	EGP/USD	19.69	0.1%	25.3%
India	17,730.75	0.9%	0.9%	3.7%	2.2%	INR/USD	82.68	0.0%	11.2%
Kenya	1,705.08	0.03%	0.03%	-0.7%	-10.4%	KES/USD	121.20	0.0%	7.1%
Nigeria	1,603.04	0.1%	0.1%	-8.2%	-6.9%	NGN/USD	440.75	0.0%	6.5%
Saudi Arabia	12,075.27	0.6%	0.9%	5.1%	6.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	58,461.97	-1.1%	-1.1%	1.9%	-12.8%	ZAR/USD	18.43	1.0%	15.5%
Vietnam	973.88	-3.6%	-3.6%	-15.5%	-36.6%	VND/USD	24,855.00	0.0%	9.1%

## MSCI Emerging Markets

MSCI Frontier	451.87	-0.9%	-0.9%	-5.7%	-32.1%	Brent Crude (\$)	93.26	-0.3%	19.9%
MSCI Frontier 100	1,048.33	-1.1%	-1.1%	-6.2%	-31.6%	Gold (\$)	1,654.10	-0.1%	-9.5%
MSCI Emerging	842.76	-2.6%	-2.6%	-3.8%	-31.6%	Copper (\$)	7,556.00	-0.9%	-22.3%
MSCI World (USD)	2,493.06	1.2%	1.2%	4.8%	-22.9%	Coffee (\$)	171.10	-0.3%	-13.8%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	22.55	2.7%	-4.9%	15.57	Unilever	10.80	-10.0%	-19.4%	6.76
Axamansard	1.63	1.9%	-26.9%	1.28	P Z Cussons	8.85	-3.8%	45.1%	5.92
MTNN	197.50	1.3%	8.5%	60.04	Sterling	1.52	-3.8%	1.3%	1.52
					Transnational Corp	1.05	-3.7%	6.1%	11.93
					Fidelity	3.75	-1.3%	47.1%	14.43
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Wema	3.30	3.30	0.0%	1.32	Guaranty	18.40	18.00	2.2%	97.32
Transcorp Hotels	6.25	6.25	0.0%	0.01	Unilever	10.80	10.50	2.9%	6.76
Total	197.00	197.00	0.0%	10.83	Nascon	9.50	9.00	5.6%	0.57
Seplat Petroleum	1200.00	1200.00	0.0%	0.08	Cap	17.75	15.25	16.4%	0.21
P Z Cussons	8.85	8.85	0.0%	5.92	Stanbic IBTC	29.00	24.50	18.4%	1.84

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.52	8.3%	-11.1%	0.00	Abu Dhabi Aviation Co.	6.45	-7.7%	31.6%	3.54
Easy Lease Motorcycle Rental	39.48	3.9%	36.1%	15.06	Hayah Insurance	1.00	-5.7%	53.8%	0.19
Al Yah Satellite Communications	2.66	1.5%	-3.3%	5.77	Gulf Cement Co.	0.53	-4.9%	-24.3%	0.22
Manazel PJSC	0.40	1.5%	-23.7%	3.03	National Corp For Tourism & Hotels	2.12	-4.5%	-29.3%	0.13
AGTHIA Group	4.39	1.4%	-14.8%	3.38	Esg Emirates Stallions Group	5.69	-2.4%	-28.9%	12.04
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 Wathba National Insurance Co.	5.50	5.50	0.0%	0.00	Emirates Telecom. Group Company	0.00	0.00	0.0%	0.00
Al Buhaira National Insurance Co.	2.30	2.30	0.0%	0.00	Hily Holding	2.70	2.70	0.0%	0.00
Al Fujairah National Insurance Co.	224.00	224.00	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Finance House	2.12	2.12	0.0%	0.00	Invictus Investment Co.	3.50	3.50	0.0%	11.67

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Eastern Company	11.40	4.6%	6.3%	22.20	Tenth Of Ramadan Pharma Industries & Diagnostic	2.55	-5.2%	6.3%	2.23
Alexandria Containers and goods	11.27	3.7%	34.2%	11.01	Telecom Egypt	17.63	-2.9%	5.1%	12.44
Egyptian Kuwaiti Holding-EGP	23.14	3.1%	17.8%	2.71	GB Auto	3.41	-2.6%	-33.1%	5.30
Commercial International Bank	27.87	2.5%	-20.9%	184.70	Oriental Weavers	6.82	-2.4%	-21.5%	4.37
T M G Holding	7.41	1.1%	-18.3%	40.60	Ibnsina Pharma	1.74	-2.3%	-50.1%	5.81
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	11.27	11.34	-0.6%	11.01	Cleopatra Hospital Company	3.95	3.81	3.7%	0.63
Misr Fertilizers Production Co.	112.41	115.00	-2.3%	5.43	Oriental Weavers	6.82	6.30	8.3%	4.37
Eastern Company	11.40	12.25	-6.9%	22.20	T M G Holding	7.41	6.50	14.0%	40.60
Egyptian Kuwaiti Holding	23.14	25.50	-9.3%	2.71	Alexandria Mineral Oils Company	3.79	3.21	18.1%	3.43
Telecom Egypt	17.63	19.75	-10.7%	12.44	Eastern Company	11.40	9.53	19.6%	22.20

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Icici Bank	933.25	2.9%	26.1%	4057.943	Hul	2574.25	-3.0%	9.1%	1857.10
Nestle India Limited	20790.00	2.4%	5.5%	941.97	Kotak Mahindra Bank	1898.00	-0.2%	5.7%	1232.75
State Bank Of India	572.15	2.0%	24.3%	2102.45	Hdfc Life Insurance Co. Ltd	541.40	-0.1%	-16.6%	211.27
Larsen & Toubro	1910.65	1.8%	0.8%	515.34	.				
HDFC	2392.20	1.8%	-7.5%	784.02					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Icici Bank	933.25	936.65	-0.4%	4057.94	Wipro	384.50	372.40	3.2%	668.49
Cipla	1146.15	1150.40	-0.4%	148.81	Bharat Petroleum	300.70	288.05	4.4%	118.26
Sun Pharma Industries	986.40	991.90	-0.6%	189.30	Divi's Laboratories	3611.60	3365.55	7.3%	170.78
State Bank Of India	572.15	578.50	-1.1%	2102.45	Tata Consultancy Svs.	3155.00	2926.10	7.8%	826.37
Coal India	240.25	243.00	-1.1%	175.75	Hdfc Life Insurance Company Ltd	541.40	497.05	8.9%	211.27

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Equity Group Holdings	46.75	3.1%	-11.4%	6.76	Centum Investment Company	8.96	-2.8%	-36.5%	0.22
Nation Media Group	16.45	2.8%	-10.8%	0.08	Nairobi Securities Exchange	7.32	-1.9%	-2.6%	0.01
Kcb Group	37.40	2.3%	-17.7%	4.02	Safaricom	24.55	-1.6%	-35.3%	16.87
Stanbic Holdings	100.00	2.0%	14.6%	0.52	Total Kenya Ltd	23.00	-0.9%	-8.0%	0.00
Ncba Group	30.40	0.5%	20.6%	0.10	Diamond Trust Bank Ltd	48.65	-0.7%	-18.2%	0.05
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)
East African Breweries Limited	168.75	174.75	-3.4%	2.06	Diamond Trust Bank Limited	48.65	48.00	1.4%	0.05
Standard Chartered Bank	138.75	148.75	-6.7%	1.85	Kengen Limited	3.40	3.35	1.5%	0.95
Stanbic Holdings	100.00	108.00	-7.4%	0.52	Kenya Reinsurance Corp Ltd	1.86	1.80	3.3%	0.38
NCBA Group	30.40	33.25	-8.6%	0.10	Safaricom	24.55	23.00	6.7%	16.87
Absa Bank Kenya	11.60	12.95	-10.4%	0.67	Nation Media Group	16.45	15.40	6.8%	0.08

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudia Dairy And Foodstuff Co.	221.00	10.0%	33.9%	29.01	Saudi Kayan Petrochemical Co.	13.80	-3.8%	-18.9%	86.60
Saudi Enaya Coop Insurance Co.	24.18	4.7%	-22.3%	20.30	Saudi Arabian Amiantit Co.	35.85	-2.7%	100.3%	3.89
Acwa Power Co.	183.20	4.3%	118.1%	219.13	Al Jouf Cement Co.	11.42	-2.6%	5.0%	5.56
Saudi British Bank	42.20	4.2%	27.9%	33.90	National Co. For Learning And Edu.	60.20	-2.4%	0.3%	4.89
Dar Alarkan Real Estate Development Co.	17.24	3.5%	71.4%	131.88	National Industrialization Co.	13.80	-2.4%	-30.9%	55.85
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)
Alamar Foods Co.	148.60	148.60	0.0%	13.01	Alkhabeer Reit Fund	7.80	7.80	0.0%	0.84
Saudi Arabian Mining Co.	82.00	82.00	0.0%	380.86	Allied Coop Insurance Group	12.62	12.62	0.0%	1.04
Retal Urban Development Co.	141.60	141.60	0.0%	11.14	Chubb Arabia Coop Insurance Co.	17.30	17.30	0.0%	2.56
Nahdi Medical Co.	202.20	202.20	0.0%	21.84	Gulf General Coop Insurance Co.	8.78	8.78	0.0%	5.57
Scientific And Medical Equipment House Co.	72.20	72.20	0.0%	28.73	Gulf Union Alahlia	8.65	8.65	0.0%	0.65

## 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	70484.00	4.3%	20.3%	66239.74	Naspers Ltd	171135.00	-17.4%	-30.8%	367590.96
Investec	11672.00	3.7%	9.8%	9694.09	Prosus NV	74148.00	-15.2%	-43.4%	216593.80
Mondi	31017.00	3.7%	-21.5%	19216.02	Mtn Group	11425.00	-6.1%	-33.1%	80567.90
Investec Ltd	8737.00	3.6%	6.5%	7906.36	Vodacom Group Ltd	11672.00	-3.2%	-13.3%	26460.81
Sasol Ltd	29880.00	2.6%	15.4%	33271.89	Aspen Pharmacare Holdings Ltd	14734.00	-0.8%	-34.4%	17406.28
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	10377.00	10394.00	-0.2%	52843.64	Vodacom Group Ltd	11672.00	11562.00	1.0%	26460.81
Absa Group Ltd	19327.00	19536.00	-1.1%	47270.73	Mtn Group	11425.00	11262.00	1.4%	80567.90
Bhp Group	50000.00	52553.00	-4.9%	0.00	Bid Corp Ltd	28800.00	27118.00	6.2%	23227.14
Woolworths Holdings Ltd	6214.00	6553.00	-5.2%	20292.77	Mr Price Group Ltd	17528.00	16455.00	6.5%	6378.88
Exxaro Resources Ltd	22115.00	23998.00	-7.8%	21067.39	Multichoice Group	11701.00	10925.00	7.1%	10097.66

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Tien Phong Commercial Joint Stock Bank	20150.00	0.2%	-50.9%	65723.26	Techcombank	21300.00	-7.0%	-57.4%	251352.78
					Vinhomes	44600.00	-7.0%	-44.0%	81796.40
					Mobile World Inv.	50600.00	-7.0%	-25.0%	244296.80
					Vietnam National Petroleum Group	29300.00	-7.0%	-45.6%	42546.53
					Khang Dien House Trading & Investment	22200.00	-6.9%	-52.1%	27166.14
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.	181000.00	203000.00	-10.8%	50553.30	Khang Dien House Trading & Investment	22200.00	22200.00	0.0%	27166.14
Vinamilk	74000.00	87004.15	-14.9%	116816.40	Mobile World Inv. Corp	50600.00	50600.00	0.0%	244296.80
Petrovietnam Gas	107200.00	130442.43	-17.8%	53985.92	Vietnam National Petroleum Group	29300.00	29300.00	0.0%	42546.53
No Va Land Invest	74400.00	91000.00	-18.2%	175375.68	Saigon Securities Inc	15100.00	15100.00	0.0%	352648.42
FPT Corp	71100.00	97944.43	-27.4%	101395.71	Sai Gon Thuong Tin Comm	14850.00	14850.00	0.0%	403138.89

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