

Daily Market Report

27 October 2022

JSE

JSE All-Share Index surged by 1.90% and closed at 67,103.06 points on Wednesday, as Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index increased by 0.41% and closed at 200.84 points on Wednesday, with Solibra Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index was up by 0.16% to close at 44,859.78 points on Wednesday, as the Industrials and Banking sectors recorded gains.

EGX

EGX 30 Index increased by 0.75% and closed at 10,553.20 points on Wednesday, as the market gained LE 4.3 billion of market cap, amid Egyptian and foreign buying.

ESG

Casablanca ESG 10 Index fell by 2.09% to close at 796.60 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.90%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.41%
NGX Nigerian Stock Exchange	▲ 0.16%
EGX Egyptian Stock Exchange	▲ 0.75%
ESG Casablanca Stock Exchange	▼ 2.09%

African Markets

Nigeria: NGX 30 Index increased by 0.13% and closed at 1,619.24 points on Wednesday. Fidelity and BUA Cement were the top gainers.

Egypt: EGX 30 Index increased by 0.75% and closed at 10,553.20 points on Wednesday, as the market gained LE 4.3 billion of market cap, amid Egyptian and foreign buying.

Kenya: NSE 20 Index decreased by 0.34% and closed at 1,694.11 points on Wednesday. Total Kenya and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index surged by 2.19% and closed at 60,566.29 points on Wednesday, as Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	20.77%
Exchange Rate	₦ 437.16
INTERBANK RATES	
OPR	16.34 ↔
Overnight	16.51 ↔

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.28% to close at 10,088.37 points on Wednesday, as gains in the Industrials, Energy and Financials sectors led shares higher. MSCI UAE decreased by 0.40% to close at 425.75 points.

Vietnam: VN-30 Index was down by 0.11% to close at 990.41 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.68% to close at 637.58 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.46% to close at 11,798.77 points on Wednesday, as losses in the Pharma, Consumer Services and Consumer Durables & Apparel sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.71% to close at 1,646.17 points.

India: Nifty 50 Index market closed on Wednesday on account of Diwali-Balipratipada.

News

Nigeria:

FEC approves N17bn for communications infrastructure
Buhari eyes over \$1.3bn trade with South Korea
GTCO records N169.7bn Q3 profit

Kenya:

Portland Cement settles Sh6.8 billion KCB loan
Biogas firm gets Sh1.2bn to supply farmers digesters
Kwale miner's titanium exports rally to Sh7.5bn

Abu Dhabi:

Miral unveils new brand identity, announces portfolio worth \$3.5bn
First Abu Dhabi Bank reports group net profit of Dh10.9b for first nine months
ADX-listed heavyweight IHC has plans to issue new shares

Saudi Arabia:

PIF to launch 5 regional investment firms to draw \$24bn: Saudi Crown Prince
Saudi Aramco sets up \$1.5bn sustainability fund
Saudi telco Etihad Atheeb turns into profits of \$1.3bn in first six months

Egypt:

Egypt aims to double capital of sovereign fund to reach LE400B
UAE's direct investment in Egypt registers \$4.6bn in first 9 months of FY2022
TSFE aims to increase its capital to EGP 1trn over next 5 years

South Africa:

Treasury lowers 2022 economic growth expectations to 1.9%
R30bn lifeline for Denel, Sanral and Transnet
SA government to take on at least two-thirds of Eskom debt

India:

India, China trade crosses \$100 bn during 9M22; trade deficit over \$75 bn
Investments in energy storage, smart grid rose to \$25 bn in January-Sept
Govt unveils Satcom reforms; nudges telecom cos to deploy 5G towers fast

Vietnam:

Highest rise in many years as State Bank sets new exchange rate
Vietnam's largest refinery says to run at full capacity to meet fuel demand
Kien Giang records 15% growth in 10-month export turnover

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,088.37	0.3%	-0.3%	3.5%	18.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,553.20	0.7%	2.7%	8.9%	-11.4%	EGP/USD	19.71	0.0%	25.5%
India	17,656.35	0.0%	0.5%	3.3%	1.7%	INR/USD	82.73	0.0%	11.3%
Kenya	1,694.11	-0.3%	-0.6%	-1.4%	-11.0%	KES/USD	121.25	0.0%	7.2%
Nigeria	1,619.24	0.1%	1.1%	-7.3%	-6.0%	NGN/USD	440.75	0.0%	6.5%
Saudi Arabia	11,798.77	-1.5%	-1.4%	2.7%	4.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	60,566.29	2.2%	2.5%	5.5%	-9.7%	ZAR/USD	17.97	-1.3%	12.6%
Vietnam	990.41	-0.1%	-2.0%	-14.0%	-35.5%	VND/USD	24,845.00	0.0%	9.0%

MSCI Emerging Markets

MSCI Frontier	456.99	0.3%	0.2%	-4.6%	-31.3%	Brent Crude (\$)	95.69	2.3%	23.0%
MSCI Frontier 100	1,057.30	0.1%	-0.2%	-5.4%	-31.0%	Gold (\$)	1,669.20	0.7%	-8.7%
MSCI Emerging	851.81	0.9%	-1.5%	-2.7%	-30.9%	Copper (\$)	7,792.00	3.6%	-19.8%
MSCI World (USD)	2,535.68	-0.1%	3.0%	6.6%	-21.5%	Coffee (\$)	169.05	-0.9%	-14.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	3.80	3.3%	49.0%	12.44	Dangote Sugar	15.35	-5.8%	-7.0%	25.33
BUA Cement	70.00	2.6%	4.4%	45.18	Sterling	1.50	-3.8%	0.0%	14.28
UBA	7.05	0.7%	-11.9%	11.98	Access	7.70	-3.8%	-15.4%	48.61
					FBNH	9.10	-1.1%	-20.9%	26.89
					Stanbic IBTC	28.75	-0.9%	-20.1%	15.35
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%	0.33	Unilever	10.50	10.50	0.0%	0.49
Transcorp Hotels	6.25	6.25	0.0%	0.01	Guaranty	18.20	18.00	1.1%	84.85
Total	197.00	197.00	0.0%	3.62	Nascon	9.50	9.00	5.6%	0.59
Seplat Petroleum	1200.00	1200.00	0.0%	0.71	Cap	17.75	15.25	16.4%	2.20
P Z Cussons	8.85	8.85	0.0%	1.23	Stanbic IBTC	28.75	24.50	17.3%	15.35

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Q Holding	4.08	5.2%	-7.5%	39.51	First Abu Dhabi Bank	17.46	-1.7%	-7.3%	48.70
RAK Co. for White Cement & Construction Materials	1.95	4.8%	14.7%	0.00	Gulf Pharma Industries	1.24	-1.6%	-32.6%	0.19
Abu Dhabi Islamic Bank	9.62	4.6%	40.0%	72.15	Emirates Insurance	7.20	-1.4%	1.4%	0.01
Hayah Insurance Company	1.08	3.9%	66.2%	0.08	Response Plus Holding	6.09	-1.3%	-36.9%	9.64
APEX INVESTMENT	3.90	3.7%	-41.8%	11.39	Abu Dhabi Ports Co.	5.80	-0.9%	60.2%	48.53
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	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	Union Insurance Co.	0.52	0.52	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ezz Steel	15.52	6.4%	3.5%	59.51	Alexandria Containers & Goods	10.68	-4.0%	27.1%	5.39
Elswedy Electric	8.30	4.3%	-15.6%	33.47	Orascom Construction	65.50	-2.1%	-13.7%	9.08
Heliopolis Housing	6.00	4.0%	-10.6%	54.08	Misr Fertilizers Production Co	110.00	-1.1%	12.8%	1.80
GB Auto	3.56	3.8%	-30.2%	18.16	Cleopatra Hospital Company	3.92	-0.8%	-20.3%	5.68
Housing & Development Bank	41.00	2.2%	-6.9%	9.67	Oriental Weavers	7.03	-0.6%	-19.1%	2.05
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£)
Misr Fertilizers Production Co	110.00	115.00	-4.3%	1.80	Cleopatra Hospital Company	3.92	3.81	2.9%	5.68
Alexandria Containers and goods	10.68	11.44	-6.6%	5.39	Oriental Weavers	7.03	6.30	11.6%	2.05
Egyptian Kuwaiti Holding-EGP	23.49	25.50	-7.9%	25.62	T M G Holding	7.51	6.50	15.5%	7.72
Eastern Company	11.25	12.25	-8.2%	10.10	Eastern Company	11.25	9.53	18.0%	10.10
Telecom Egypt	18.01	19.75	-8.8%	6.83	Alexandria Mineral Oils Company	3.79	3.21	18.1%	2.71

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1083.00	3.3%	-39.5%	3326.695	Britannia Inds.	3695.00	-2.8%	2.5%	850.42
Maruti Suzuki India	9010.10	2.8%	21.3%	6506.45	Kotak Mahindra Bank	1844.50	-2.7%	2.7%	6522.68
Jsw Steel	644.30	2.3%	-1.8%	3072.69	HUL	2504.00	-2.7%	6.1%	7372.66
Larsen & Toubro	1945.00	1.9%	2.6%	4133.74	Nestle India Limited	20324.65	-2.6%	3.1%	1455.65
Eicher Motors	3702.00	1.7%	42.8%	2107.08	Bajaj Finserv	1657.00	-2.6%	-89.9%	3123.79
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	990.50	997.35	-0.7%	2102.28	Wipro	384.50	372.40	3.2%	1112.70
Cipla	1155.05	1164.85	-0.8%	2554.42	Bharat Petroleum	303.00	288.05	5.2%	857.99
Coal India	239.90	243.00	-1.3%	1674.23	Divi's Laboratories	3590.50	3365.55	6.7%	757.41
State Bank Of India	577.00	586.20	-1.6%	11507.38	HDFC Life Insurance Company	533.85	497.05	7.4%	1268.62
Axis Bank	900.95	918.45	-1.9%	11868.97	Tata Consultancy Svs.	3160.15	2926.10	8.0%	6552.90

*Market closed on 26/10

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom	24.95	2.3%	-34.3%	98.37	Total Kenya Ltd	23.00	-7.8%	-8.0%	0.98
Kenya Reinsurance Corporation	1.92	1.6%	-16.5%	0.05	WPP Scangroup	3.01	-5.9%	-27.3%	0.37
Diamond Trust Bank Limited	48.70	1.1%	-18.2%	0.87	Stanbic Holdings	96.75	-3.3%	10.9%	0.20
Nation Media Group	15.85	1.0%	-14.1%	0.14	Centum Investment Company	8.48	-1.6%	-39.9%	0.23
Standard Chartered Bank Kenya	140.25	0.9%	9.4%	0.48	Absa Bank Kenya	11.35	-1.3%	-4.2%	0.44
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	167.50	174.75	-4.1%	21.52	Kengen Limited	3.38	3.35	0.9%	3.59
Standard Chartered Bank Kenya	140.25	148.75	-5.7%	0.48	Nation Media Group	15.85	15.00	5.7%	0.14
NCBA Group	30.95	33.25	-6.9%	0.64	Diamond Trust Bank	48.70	46.05	5.8%	0.87
Stanbic Holdings	96.75	108.00	-10.4%	0.20	Centum Investment Co.	8.48	8.00	6.0%	0.23
Nairobi Securities Exchange	7.50	8.40	-10.7%	0.02	Kenya Reinsurance Corporation Ltd	1.92	1.80	6.7%	0.05

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Fitaihi Holding Group	36.20	4.6%	-11.2%	48.39	Bindawood Holding	62.90	-5.4%	-34.3%	42.95
Al Jouf Cement Co.	12.00	4.4%	10.3%	34.74	Arabian Internet And Communications Services Co.	251.80	-5.0%	33.8%	90.32
Salama Cooperative Insurance Co.	14.56	4.2%	-14.4%	6.27	Scientific And Medical Equipment House Co.	67.20	-5.0%	-0.6%	55.74
Al Hassan Ghazi Ibrahim Shaker Co.	22.34	2.5%	0.8%	19.76	Yanbu National Petrochemical Co.	44.55	-4.6%	-35.2%	99.32
Saudi Electricity Co.	26.95	2.3%	12.4%	35.87	East Pipes Integrated Company For Industry	45.45	-4.5%	-46.5%	6.34
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.	145.00	145.00	0.0%	10.12	Al Kathiri Holding	42.65	42.65	0.0%	3.11
Saudi Arabian Mining Co.	81.30	81.30	0.0%	397.62	Alkhabeer REIT Fund	7.77	7.77	0.0%	0.54
Retal Urban Development Co.	140.00	140.00	0.0%	35.98	Allied Coop Insurance Group	12.24	12.24	0.0%	1.36
Nahdi Medical Co.	200.40	200.40	0.0%	121.17	CHUBB Arabia Coop Insurance Co.	16.70	16.70	0.0%	1.09
Elm Co.	326.00	326.00	0.0%	39.26	Gulf General Coop Insurance Co.	8.48	8.48	0.0%	3.29

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings Ltd	18728.00	6.7%	-16.8%	61133.34	Growthpoint Properties Ltd	1278.00	-4.3%	-16.9%	13031.94
Naspers Ltd	12300.00	6.2%	-24.6%	244823.83	Mr Price Group Ltd	17215.00	-3.6%	-13.7%	38295.06
Sibanye Stillwater Ltd	4360.00	5.7%	-11.2%	50825.29	Woolworths Holdings	6296.00	-2.4%	21.4%	45855.15
Anglo American Platinum Ltd	147422.00	4.5%	-13.5%	27839.47	SPAR Group Ltd/The	15264.00	-0.9%	-8.7%	7833.76
Prosus NV	78507.00	4.3%	-40.1%	136397.43	Cie Financiere Richemont SA	18795.00	-0.01%	-21.4%	60325.84
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)
Glencore PLC	10632.00	10649.00	-0.2%	50229.80	Mr Price Group Ltd	17215.00	16455.00	4.6%	38295.06
Absa Group Ltd	20217.00	20294.00	-0.4%	77918.30	Vodacom Group Ltd	12300.00	11562.00	6.4%	24186.94
Woolworths Holdings Ltd/South Africa	6296.00	6553.00	-3.9%	45855.15	MultiChoice Group	11894.00	10925.00	8.9%	7131.07
BHP Group PLC	50000.00	52553.00	-4.9%	0.00	Bid Corp Ltd	29764.00	27118.00	9.8%	17453.64
Shoprite Holdings Ltd	23446.00	24723.00	-5.2%	37039.50	MTN Group	12487.00	11262.00	10.9%	53569.09

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	78000.00	4.0%	-44.9%	78468.00	Vincom Retail	22200.00	-3.5%	-26.2%	14811.84
Khang Dien House Trading & Investment	21700.00	3.3%	-53.2%	64403.43	Phat Dat Real Estate Development Corp	45500.00	-2.6%	-34.9%	39967.20
BaoViet Holdings	51200.00	2.4%	-8.6%	30858.24	Vinhomes	43500.00	-2.5%	-45.4%	160963.05
Bank for Inv. and Devp	31700.00	1.3%	-14.6%	21682.80	Vingroup JSC	54800.00	-2.3%	-42.4%	57764.68
Asia Commercial JS Bank	20650.00	1.2%	-25.2%	44791.92	Saigon Securities Inc	14850.00	-1.3%	-67.7%	133863.84
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.	186100.00	203000.00	-8.3%	28026.66	Vietnam National Petroleum Group	27750.00	27300.00	1.6%	17407.58
Vinamilk	76000.00	87004.15	-12.6%	62677.20	Phat Dat Real Estate Development Corp	45500.00	44600.00	2.0%	39967.20
Petrovietnam Gas	108000.00	130442.43	-17.2%	19634.40	Vietjet Aviation	107500.00	105100.00	2.3%	13921.25
No Va Land Invest	74500.00	91000.00	-18.1%	79655.40	Ho Chi Minh City Devp	15950.00	15400.00	3.6%	14680.38
FPT Corp	73800.00	97944.43	-24.7%	46132.38	Vingroup JSC	54800.00	52900.00	3.6%	57764.68

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