

Daily Market Report

11 November 2022

JSE

JSE All-Share Index jumped by 1.54% and closed at 70,710.25 points on Thursday, as the Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index was down by 0.18% and closed at 194.86 points on Thursday, with Total Côte d'Ivoire and Bank of Africa - Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index climbed by 1.07% to close at 43,942.82 points on Thursday, as the Banking, Oil & Gas, and Industrials sectors recorded gains.

EGX

EGX 30 Index decreased by 0.21% and closed at 11,756.56 points on Thursday, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index dropped by 2.13% to close at 774.07 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.54%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.18%
NGX Nigerian Stock Exchange	▲	1.07%
EGX Egyptian Stock Exchange	▼	0.21%
ESG Casablanca Stock Exchange	▼	2.13%

African Markets

Nigeria: NGX 30 Index jumped by 1.31% to close at 1,587.58 points on Thursday. Dangote Cement and Fidelity were the top gainers.

Egypt: EGX 30 Index decreased by 0.21% and closed at 11,756.56 points on Thursday, amid Egyptian and foreign selling.

Kenya: NSE 20 Index was down by 0.12% and closed at 1,667.34 points on Thursday. Total Kenya and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index jumped by 1.68% and closed at 64,087.41 points on Thursday, as the Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	20.77%
Exchange Rate	₦ 441.13
INTERBANK RATES	
OPR	8.50 ↔
Overnight	8.83 ↔

Other Emerging Markets

Abu Dhabi: ADX Index inched up by 0.01% to close at 10,619.43 points on Thursday, as gains in the Financials, Industrials and Real Estate sectors led shares higher. MSCI UAE decreased by 0.55% to close at 439.59 points.

Vietnam: VN-30 Index fell by 4.38% to close at 936.80 points on Thursday, amid underperformance by large-cap stocks and investor selling. MSCI Vietnam fell by 4.09% to close at 586.97 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.71% to close at 11,211.70 points on Thursday, as losses in the Pharma, Consumer Durables & Apparel, and Capital Goods sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.91% to close at 1,556.17 points.

India: Nifty 50 Index declined by 0.71% to close at 18,028.20 points on Thursday, as losses in the Pharma, Auto, and Metal sectors pushed shares lower. MSCI India declined by 0.88% to close at 2,080.31 points.

News

Nigeria:

Fed Govt to raise N300b new bonds from investors
World Bank Group okays \$2.7b renewable energy plan for Nigeria, others
AfDB provides over \$1.1bn to 20,500 Nigerian MSMEs

Kenya:

Kenya eyes 100pc shift to clean energy by 2028
Kenya Defers KES 85 Billion Loan Repayments on Lack of Funds -IMF
President Ruto tax push suffers blow with Sh13.9bn shortfall in Q1

Abu Dhabi:

UAE cooperative law to come into effect in December
Burjeel 9-month revenues jump 17.8% to \$770m
ENOC Group, Japan's IHI Corp sign MoU

Saudi Arabia:

Saudi PIF to sell 10% of its stake in Saudi Tadawul Group
Saudi Arabia's industrial production rises 15.7% in September: GASTAT
stc signs binding offer with solutions to sell 49% stake in Contact Center Co.

Egypt:

Egypt's annual inflation rises to 16.3% in October, urban inflation reaches 16.2%
Egypt's annual core inflation records 19% in October: CBE
Egyptian private sector ready to issue \$120-200B green bonds

South Africa:

South African manufacturing output up 2.9% y/y in September
MultiChoice reports rise in revenue despite drop in premium subscribers
SA inks new R10bn loan for Just Transition

India:

TCS-Tejas to bag Rs 30,000 crore BSNL-MTNL 4G order
Inflows in mutual fund SIPs at record Rs 13,000 crore in October
Govt to raise over ₹4k crore via Axis stake sale
Vietnam:
Credit surges 11.5% by end-October
National Assembly fixes 2023 growth target at 6.5%
Vietnam, Canada seek to boost economic cooperation

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,619.43	0.01%	1.3%	2.0%	25.1%	AED/USD	3.67	0.0%	0.0%
Egypt	11,756.56	-0.2%	4.4%	3.4%	-1.3%	EGP/USD	24.39	0.1%	55.3%
India	18,028.20	-0.7%	-0.5%	0.1%	3.9%	INR/USD	81.80	0.4%	10.0%
Kenya	1,667.34	-0.1%	-0.5%	-0.6%	-12.4%	KES/USD	121.80	0.0%	7.6%
Nigeria	1,587.58	1.3%	-0.8%	0.5%	-7.8%	NGN/USD	442.50	0.0%	6.9%
Saudi Arabia	11,211.70	-1.7%	-2.0%	-3.9%	-1.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	64,087.41	1.7%	2.1%	6.8%	-4.4%	ZAR/USD	17.44	-1.9%	9.3%
Vietnam	936.80	-4.4%	-6.1%	-8.8%	-39.0%	VND/USD	24,867.50	0.0%	9.1%

MSCI Emerging Markets

MSCI Frontier	449.25	-0.5%	-0.6%	-1.9%	-32.5%	Brent Crude (\$)	93.67	1.1%	20.4%
MSCI Frontier 100	1,044.08	-0.4%	-0.6%	-1.4%	-31.9%	Gold (\$)	1,709.70	-0.4%	-6.5%
MSCI Emerging	889.60	-1.2%	0.5%	4.9%	-27.8%	Copper (\$)	8,271.50	2.1%	-14.9%
MSCI World (USD)	2,636.55	5.1%	5.2%	3.5%	-18.4%	Coffee (\$)	154.98	0.1%	-22.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Dangote Cement	238.50	7.8%	-7.2%	131.90	Julius Berger	21.15	-9.8%	-5.4%	4.76
Fidelity	4.05	1.3%	58.8%	35.05	Cadbury	10.25	-9.7%	16.5%	13.59
Transnational Corporation	1.06	1.0%	7.1%	38.61	Nigerian Breweries	37.50	-5.7%	-21.9%	20.04
United Capital PLC	12.10	0.8%	22.2%	9.12	Axamansard	1.53	-4.4%	-31.4%	1.80
Access	8.05	0.6%	-11.5%	634.06	Wema	3.15	-1.6%	298.7%	1.61
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	3.15	3.15	0.0%	1.61	Guaranty	17.60	17.60	0.0%	420.27
Transcorp Hotels	6.25	6.25	0.0%	0.01	Unilever	10.00	10.00	0.0%	4.87
Total	197.00	197.00	0.0%	0.69	Nascon	9.50	9.00	5.6%	0.57
Seplat Petroleum	1100.00	1100.00	0.0%	70.97	Cap	16.90	15.25	10.8%	0.82
P Z Cussons	9.25	9.25	0.0%	4.55	Stanbic IBTC	27.50	24.50	12.2%	62.46

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Invictus Investment Company	4.12	4.8%	2.2%	51.94	National Corporation for Tourism & Hotels	2.43	-10.0%	-19.0%	0.28
Alpha Dhabi Holding	27.78	4.6%	1.8%	196.62	Hayah Insurance	1.20	-9.8%	84.6%	0.68
Abu Dhabi Aviation Co.	6.98	3.9%	42.4%	4.42	Gulf Cement Co.	0.53	-6.4%	-24.4%	0.21
PALMS SPORTS PrJSC	10.98	3.6%	-10.1%	0.06	Bayanat Al	3.85	-5.2%	-6.1%	31.01
Q Holding PSC	4.23	2.9%	-4.1%	30.38	RAK Co. for White Cement & Const Materials	1.80	-3.2%	5.9%	0.75
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	Sawaed Holding	6.70	6.70	0.0%	0.00
Al Buhaira National Insurance Co.	2.30	2.30	0.0%	0.00	United Fidelity Insurance Co	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance	224.00	224.00	0.0%	0.00	Invest Bank	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00
Finance House	2.15	2.15	0.0%	0.00	Al Fujairah National Insurance Company	224.00	224.00	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£)
Credit Agricole Egypt	7.62	6.9%	-9.5%	12.92	Commercial International Bank	34.52	-4.7%	-2.0%	252.82
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.75	5.0%	14.6%	1.95	Eastern Company	12.85	-4.2%	19.9%	14.00
Ezz Steel	17.55	4.8%	17.1%	41.02					
GB AUTO	4.44	4.5%	-12.9%	36.71					
Fawry For Banking Tech And Electronic Payment	3.77	4.4%	-45.6%	44.28					
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£)
Telecom Egypt	21.50	21.53	-0.1%	26.41	Cleopatra Hospital Co.	4.50	3.81	18.1%	14.15
Egyptian Kuwaiti Holding-EGP	27.00	27.19	-0.7%	8.71	Oriental Weavers	7.79	6.30	23.7%	10.48
Ezz Steel	17.55	17.70	-0.8%	41.02	Alexandria Mineral Oils Company	4.01	3.21	24.9%	8.70
Alexandria Containers and goods	12.97	13.25	-2.1%	4.97	T M G Holding	8.37	6.50	28.8%	4.58
Eastern Company	12.85	13.41	-4.2%	14.00	Qatar National Bank Alahly	15.11	11.66	29.6%	5.59

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	2715.00	2.4%	10.3%	1898.916	Tata Motors	413.20	-4.6%	-14.3%	10856.90
Hdfc Bank	1527.00	1.2%	3.2%	9653.19	Axis Bank	841.40	-3.7%	24.0%	16063.04
Kotak Mahindra Bank	1913.60	1.1%	6.5%	4779.35	Mahindra & Mahindra	1296.50	-3.1%	54.9%	3631.20
ONGC	139.90	0.9%	-1.8%	2217.49	Bajaj Finserv	1705.00	-2.7%	-89.6%	3475.65
Bharti Airtel	826.00	0.9%	20.8%	3649.98	Titan Company	2647.50	-2.6%	5.0%	3179.85
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	356.00	361.45	-1.5%	6883.15	Wipro	389.50	372.40	4.6%	1068.48
Britannia Inds.	4134.00	4237.00	-2.4%	1729.17	Bharat Petroleum	305.55	288.05	6.1%	427.18
State Bank Of India	605.05	622.70	-2.8%	7054.93	HDFC Life Insurance Company	529.20	497.05	6.5%	730.28
Coal India	254.40	263.40	-3.4%	5330.01	Tech Mahindra	1022.00	943.70	8.3%	3350.47
Icici Bank	910.00	943.25	-3.5%	9089.85	Tata Consultancy Svs.	3205.00	2926.10	9.5%	5046.81

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	25.50	1.4%	-32.8%	106.98	Total Kenya Ltd	23.90	-4.2%	-4.4%	0.01
Kenya Reinsurance Corporation Ltd	1.89	1.1%	-17.8%	0.02	Kenya Power & Lighting Limited	1.62	-3.6%	-7.4%	1.10
Nation Media Group	16.60	0.9%	-10.0%	0.01	WPP Scangroup Plc	3.12	-1.9%	-24.6%	0.08
Diamond Trust Bank Limited	49.00	0.8%	-17.6%	0.22	The Coop Bank of Kenya Ltd	11.80	-1.3%	-8.9%	1.01
Standard Chartered Bank Kenya Ltd	137.00	0.7%	6.8%	1.27	NCBA Group Plc	32.00	-1.2%	27.0%	1.14
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	32.00	33.25	-3.8%	1.14	Kengen Limited	3.28	3.25	0.9%	0.91
Standard Chartered Bank Kenya Ltd	137.00	148.75	-7.9%	1.27	Kenya Reinsurance Corp Ltd	1.89	1.80	5.0%	0.02
Absa Bank Kenya	11.85	12.95	-8.5%	0.65	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	0.00
Total Kenya Ltd	23.90	26.40	-9.5%	0.01	Centum Investment Company	8.50	8.00	6.3%	1.40
Stanbic Holdings	97.75	108.00	-9.5%	0.02	Diamond Trust Bank Limited	49.00	46.05	6.4%	0.22

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabian Amiantit Co.	42.45	10.0%	137.2%	36.64	Etiihad Atheeb Telecom Co.	56.70	-9.9%	92.9%	112.25
Kingdom Holding Co.	8.00	2.4%	-20.8%	10.86	Al Sagr Coop Insurance Co.	15.30	-7.3%	-14.1%	3.84
Alamar Foods Co.	142.60	1.9%	16.9%	21.57	National Company for Learning and Education	59.80	-6.0%	-0.3%	3.08
Al Rajhi REIT Fund	10.04	1.2%	-8.1%	4.82	Al Gassim Investment Holding	21.60	-5.7%	-8.7%	10.00
Umm Al-Qura Cement Co.	17.04	1.2%	-27.7%	3.73	Al Hassan Ghazi Ibrahim Shaker Co.	19.06	-5.5%	-14.0%	12.96
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.	142.60	142.60	0.0%	21.57	Al Alamiya for Coop Insurance Co.	13.18	13.18	0.0%	1.35
Retal Urban Development Co.	132.20	132.20	0.0%	3.27	Al Kathiri Holding	40.10	40.10	0.0%	3.29
Nahdi Medical Co.	195.80	195.80	0.0%	34.53	Alkhabeer REIT Fund	7.76	7.76	0.0%	4.37
Elm Co.	306.40	306.40	0.0%	54.30	Aseer Trading, Tourism and Manufacturing Co.	0.00	0.00	0.0%	0.00
Saudi Tadawul Group Holding Co.	209.60	209.60	0.0%	38.93	AXA Coop Insurance	0.00	0.00	0.0%	0.00

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	220179.00	4.5%	-10.9%	169400.44	Glencore PLC	10227.00	-3.1%	28.6%	58414.47
Prosus NV	13088.00	4.0%	-31.0%	154568.82	British American Tobacco PLC	67604.00	-1.9%	15.4%	37414.89
AngloGold Ashanti Ltd	30469.00	3.2%	-7.3%	108781.79	Sasol Ltd	30024.00	-1.3%	15.9%	73365.12
Anglo American Platinum Ltd	165537.00	3.0%	-2.9%	40773.58	Exxaro Resources	21735.00	-0.8%	42.2%	17055.17
Anglo American PLC	63536.00	2.8%	-1.5%	78549.87	Clicks Group Ltd	30300.00	-0.7%	-4.0%	32679.94
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)
Investec PLC	9684.00	9718.00	-0.3%	10673.49	Bid Corp Ltd	30266.00	27118.00	11.6%	20240.99
Woolworths Holdings Ltd	6681.00	6709.00	-0.4%	33590.23	Clicks Group Ltd	30300.00	26993.00	12.3%	32679.94
Absa Group Ltd	19908.00	20436.00	-2.6%	66660.31	MultiChoice Group	12307.00	10925.00	12.6%	8277.37
Investec Ltd	9554.00	9830.56	-2.8%	6019.01	Mr Price Group Ltd	18592.00	16455.00	13.0%	15575.45
Standard Bank Group Ltd	17986.00	18798.00	-4.3%	52083.75	Vodacom Group Ltd	13088.00	11562.00	13.2%	24102.80

Vietnam

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
					Vietnam JSC Bank	22750.00	-7.0%	-32.9%	218930.08
					Phat Dat Real Estate Development Corp	28150.00	-6.9%	-59.7%	4943.14
					No Va Land Invest	44950.00	-6.9%	-50.6%	14905.42
					Vietnam Rubber Group	12100.00	-6.9%	-65.5%	964968.95
					Hoa Phat Group JSC	12100.00	-6.9%	-65.5%	964968.95
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
Vinamilk	78400.00	85958.20	-8.8%	206787.84	Vietnam Rubber Group	12100.00	12100.00	0.0%	964968.95
Saigon Beer Alcohol Beverage Corp.	184500.00	203000.00	-9.1%	30922.20	Hoa Phat Group JSC	12100.00	12100.00	0.0%	964968.95
Petrovietnam Gas	113400.00	130442.43	-13.1%	31321.08	No Va Land Invest	44950.00	44950.00	0.0%	14905.42
Vietcombank	72800.00	96000.00	-24.2%	69778.80	Phat Dat Real Estate Development Corp	28150.00	28150.00	0.0%	4943.14
FPT Corp	73000.00	97944.43	-25.5%	116449.60	Saigon Securities Inc	13900.00	13800.00	0.7%	255844.79

*No gainers on 10/11

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