

Daily Market Report

14 November 2022

JSE

JSE All-Share Index surged by 3.21% and closed at 72,982.81 points on Friday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index was up by 0.20% and closed at 195.24 points on Friday, with Total Côte d'Ivoire and Ecobank Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index inched up by 0.06% to close at 43,968.75 points on Friday, as the Insurance sector recorded gains.

EGX

EGX 30 Index surged by 1.91% and closed at 11,980.62 points on Sunday, as the market gained LE 11 billion of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index declined by 0.64% to close at 769.14 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	3.21%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.20%
NGX Nigerian Stock Exchange	▲	0.06%
EGX Egyptian Stock Exchange	▲	1.91%
ESG Casablanca Stock Exchange	▼	0.64%

African Markets

Nigeria: NGX 30 Index inched down by 0.02% to close at 1,587.30 points on Friday. Flour Mills and Ecobank were the top losers.

Egypt: EGX 30 Index surged by 1.91% and closed at 11,980.62 points on Sunday, as the market gained LE 11 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index inched down by 0.05% and closed at 1,666.47 points on Friday. WPP Scangroup and Total Kenya were the top losers.

South Africa: JSE Top 40 Index surged by 3.69% and closed at 66,453.06 points on Friday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	20.77%
Exchange Rate	₦ 441.46
INTERBANK RATES	
OPR	12.00 ▲
Overnight	12.83 ▲

Other Emerging Markets

Abu Dhabi: ADX Index was up by 0.10% to close at 10,629.75 points on Friday, as gains in the Telecommunications, Energy, and Real Estate sectors led shares higher. MSCI UAE jumped by 1.28% to close at 445.21 points.

Vietnam: VN-30 Index jumped by 1.29% to close at 948.86 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.11% to close at 593.49 points.

Saudi Arabia: Tadawul All Share Index increased by 0.31% to close at 11,246.93 points on Sunday, as gains in the Utilities, Software & Services, and Healthcare Equipment & Services sectors led shares higher. MSCI Saudi Arabia increased by 0.32% to close at 1,561.12 points.

India: Nifty 50 Index rose by 1.78% to close at 18,349.70 points on Friday, as gains in the Bank, IT, and Metal sectors led shares higher. MSCI India jumped by 1.48% to close at 2,111.17 points.

News

Nigeria:

Rising inflation drives consumption expenditure to ₦57tn
Nigeria's Eurobonds Yield Tumble Amid Hike in Prices
Manufacturing outlook dips as forex crises worsen

Kenya:

Nairobi County Assembly Approves KES 38.3 Billion Development Budget
GoK Set to Cut Spending on Non-Priority Areas to Reduce Debt Burden
Safaricom Reports a Decline in 1H Profits to KES 30.2 bn

Abu Dhabi:

UAE launches \$27bn tourism strategy, eyes 40m hotel guests by 2031
Abu Dhabi real estate: \$5.729bn of property transactions in Q3
Adnoc Distribution profit surges to \$209m in record-breaking year

Saudi Arabia:

Saudi Arabia fleshes out its green targets during first day of SGI forum
Saudi Aramco partners with energy ministry to establish carbon capture and storage hub
Saudi KAPSARC launches second Circular Carbon Economy Index

Egypt:

Egypt's trade deficit increases 0.6% during August
Egypt inks 7 carbon-cutting deals with global companies at COP27
IFAD pledges \$2B for food projects in Egypt

South Africa:

SA gets R7.2bn investment boost for private sector energy projects
Transnet declares force majeure on coal export line to Richards Bay
TFG's profit buoyed by local manufacturing, Tapestry deal

India:

Industrial production grows 3.1% in September: Govt data
Forex kitty drops by \$1.09 billion to \$529.99 billion
Gross direct tax collections up 31% to Rs 10.54 lakh crore so far this fiscal

Vietnam:

US removes Vietnam from currency monitoring list
DFC signs 200-million-USD loan for SeABank
Vietnam's digital economy posts fastest growth in SA

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,629.75	0.1%	0.0%	2.1%	25.2%	AED/USD	3.67	0.0%	0.0%
Egypt	11,980.62	1.9%	1.9%	5.3%	0.6%	EGP/USD	24.39	0.0%	55.3%
India	18,349.70	1.8%	0.0%	1.9%	5.7%	INR/USD	80.81	-1.2%	8.7%
Kenya	1,666.47	-0.1%	0.0%	-0.7%	-12.4%	KES/USD	121.90	0.1%	7.7%
Nigeria	1,587.30	-0.02%	0.0%	0.5%	-7.8%	NGN/USD	442.50	0.0%	6.9%
Saudi Arabia	11,246.93	0.3%	0.3%	-3.6%	-0.7%	SAR/USD	3.76	0.0%	0.2%
South Africa	66,453.06	3.7%	0.0%	10.7%	-0.9%	ZAR/USD	17.26	-1.0%	8.2%
Vietnam	948.86	1.3%	0.0%	-7.6%	-38.2%	VND/USD	24,815.00	-0.2%	8.9%

MSCI Emerging Markets

MSCI Frontier	454.76	1.2%	0.0%	-0.7%	-31.7%	Brent Crude (\$)	95.99	2.5%	23.4%
MSCI Frontier 100	1,054.55	1.0%	0.0%	-0.4%	-31.2%	Gold (\$)	1,774.20	3.8%	-3.0%
MSCI Emerging	935.73	5.2%	0.0%	10.3%	-24.0%	Copper (\$)	8,492.50	2.7%	-12.6%
MSCI World (USD)	2,674.08	1.4%	0.0%	5.0%	-17.3%	Coffee (\$)	158.51	2.3%	-20.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	10.25	2.0%	-10.9%	49.36	Flour Mills	27.30	-9.9%	-3.7%	16.85
Transnational Corporation	1.08	1.9%	9.1%	30.33	P Z Cussons	8.60	-7.0%	41.0%	4.07
UBA	7.20	1.4%	-10.0%	52.29	Ecobank	9.50	-5.0%	13.8%	2.48
Sterling	1.41	0.7%	-6.0%	3.32	Guaranty	17.55	-0.3%	-32.5%	273.46
Zenith	19.95	0.3%	-20.2%	105.27	Nigerian Breweries	37.40	-0.3%	-22.1%	405.03
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%	8.33	Guaranty	17.55	17.55	0.0%	273.46
Transcorp Hotels	6.25	6.25	0.0%	0.00	Unilever	10.00	10.00	0.0%	2.76
Total	197.00	197.00	0.0%	3.19	Nascon	9.50	9.00	5.6%	3.15
Seplat Petroleum	1088.90	1088.90	0.0%	5.38	Cap	16.90	15.25	10.8%	0.48
P Z Cussons	8.60	8.60	0.0%	4.07	Stanbic IBTC	27.50	24.50	12.2%	17.98

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Multiply Group	4.82	5.0%	162.0%	386.63	Hayah Insurance	1.10	-8.3%	69.2%	0.83
RAK Co. for White Cement & Construction Materials	1.89	5.0%	11.2%	0.23	Sharjah Cement and Industrial Development Co.	0.57	-7.8%	-25.7%	0.12
ESHRAQ INVESTMENTS	0.53	5.0%	48.0%	37.18	National Corp for Tourism & Hotels	2.28	-6.2%	-24.0%	0.19
HILY HOLDING	3.25	4.8%	-1.5%	0.07	Abu Dhabi National Co. for Building Materials	0.17	-5.6%	-31.7%	0.00
Invictus Investment Company	4.29	4.1%	6.5%	41.98	Bayanat AI PLC	3.85	-5.2%	-6.1%	31.01
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	Anan Investment Holding	4.07	4.07	0.0%	0.00
Al Buhaira National Insurance Co.	2.30	2.30	0.0%	0.00	The National Investor	0.45	0.45	0.0%	0.00
Al Fujairah National Insurance	224.00	224.00	0.0%	0.00	Sawaheed Holding	6.70	6.70	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	United Fidelity Insurance Co	1.60	1.60	0.0%	0.00
Finance House	2.15	2.15	0.0%	0.00	Invest Bank	0.45	0.45	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£)
E-finance For Digital and Financial Investments	16.30	6.4%	-19.7%	29.96	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.70	-1.8%	12.5%	0.77
Fawry For Banking Tech And Electronic Payment	3.96	5.0%	-42.9%	105.21	Telecom Egypt	21.20	-1.4%	26.4%	24.78
Egyptian Kuwaiti Holding	28.28	4.7%	43.9%	12.95	Qatar National Bank Alahly	14.91	-1.3%	-15.8%	3.83
Citadel Capital - Common Shares	1.33	4.4%	10.3%	45.89	Ezz Steel	17.52	-0.2%	16.9%	22.49
Palm Hills Development Co.	1.46	4.1%	-26.7%	9.64					
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£)
Ezz Steel	17.52	18.00	-2.7%	22.49	Cleopatra Hospital	4.63	3.81	21.5%	18.81
Telecom Egypt	21.20	21.79	-2.7%	24.78	Alexandria Mineral Oils Company	4.07	3.21	26.8%	7.00
Alexandria Containers and goods	13.12	13.51	-2.9%	7.82	Oriental Weavers	8.00	6.30	27.0%	12.38
Commercial International Bank	35.08	36.21	-3.1%	126.51	Qatar National Bank	14.91	11.66	27.9%	3.83
Misr Fertilizers Production Company - Mopco	116.72	120.50	-3.1%	8.05	Juhayna Food Industries	7.13	5.46	30.6%	0.35

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hdfc Bank	1611.90	5.7%	9.0%	45368.511	Eicher Motors	3519.00	-4.9%	35.8%	8802.87
HDFC	2647.25	5.7%	2.4%	25352.39	Hero Motocorp	2665.00	-1.8%	8.2%	1277.25
Infosys	1570.70	4.6%	-16.8%	11279.17	State Bank Of India	600.00	-1.0%	30.3%	9396.98
Tech Mahindra	1058.35	3.7%	-40.9%	5601.90	Britannia Inds.	4100.00	-0.8%	13.7%	1418.28
Hcl Technologies	1089.00	3.5%	-17.4%	4274.69	Mahindra & Mahindra	1289.00	-0.7%	54.0%	6875.14
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bharti Airtel	829.05	841.45	-1.5%	3590.68	Bharat Petroleum	308.35	288.05	7.0%	704.71
Larsen & Toubro	2013.50	2078.55	-3.1%	2413.89	Wipro	400.10	372.40	7.4%	5701.60
Britannia Inds.	4100.00	4237.00	-3.2%	1418.28	HDFC Life Insurance Company	542.50	497.05	9.1%	3473.58
Nestle India Limited	20300.00	21050.00	-3.6%	729.21	Tech Mahindra	1058.35	943.70	12.1%	5601.90
State Bank Of India	600.00	622.70	-3.6%	9396.98	Tata Consultancy Svs.	3315.00	2926.10	13.3%	10826.77

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	100.00	2.3%	14.6%	0.05	WPP Scangroup	3.02	-3.2%	-27.1%	0.01
Kenya Power & Lighting Limited	1.65	1.9%	-5.7%	0.65	Total Kenya Ltd	23.20	-2.9%	-7.2%	0.06
KCB Group	36.75	0.7%	-19.1%	6.95	Absa Bank Kenya	11.70	-1.3%	-1.3%	0.46
Nation Media Group	16.70	0.6%	-9.5%	0.05	Kenya Reinsurance Corporation Ltd	1.87	-1.1%	-18.7%	0.13
The Cooperative Bank of Kenya Ltd	11.85	0.4%	-8.5%	0.86	Diamond Trust Bank Limited	48.50	-1.0%	-18.5%	0.49
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	31.70	33.25	-4.7%	3.67	Kengen Limited	3.29	3.25	1.2%	0.96
Stanbic Holdings	100.00	108.00	-7.4%	0.05	Kenya Reinsurance Corporation Ltd	1.87	1.80	3.9%	0.13
Standard Chartered Bank Kenya Ltd	137.00	148.75	-7.9%	0.49	Centum Investment Company	8.42	8.00	5.3%	0.16
Absa Bank Kenya	11.70	12.95	-9.7%	0.46	Diamond Trust Bank Limited	48.50	46.05	5.3%	0.49
East African Breweries Limited	157.50	174.75	-9.9%	6.73	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	70.93

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.	46.65	9.9%	160.6%	20.18	Saudi Tadawul Group Holding Co.	188.80	-9.9%	50.1%	2663.95
Etihad Atheeb Telecommunication Co.	62.30	9.9%	111.9%	79.47	Fitaihi Holding	32.20	-6.9%	-21.0%	20.68
Dallah Healthcare Co.	172.00	7.6%	129.0%	27.27	Tourism Enterprise Company	169.00	-5.4%	-0.6%	29.13
Arabian Pipes Co.	40.60	7.4%	146.7%	22.87	Saudi Enaya Cooperative Insurance Co.	16.80	-4.0%	-46.0%	8.94
Naseej International Trading Co	48.10	5.3%	68.2%	33.43	Development Works Food Co.	197.20	-3.6%	-30.2%	16.75
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.	130.40	130.40	0.0%	3.55	Al Alamiya for Cooperative Insurance Co.	13.40	13.40	0.0%	1.34
Nahdi Medical Co.	193.00	193.00	0.0%	13.12	Al Kathiri Holding	40.25	40.25	0.0%	1.27
Elm Co.	304.00	304.00	0.0%	45.65	Alkhabeer REIT Fund	7.86	7.86	0.0%	3.29
Saudi Tadawul Group Holding Co.	188.80	188.80	0.0%	2663.95	Aseer Trading, Tourism and Manufacturing Co.	0.00	0.00	0.0%	0.00
ACWA POWER Co.	154.60	154.60	0.0%	52.63	AXA Cooperative Insurance Co.	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)
Cie Financiere Richemont SA	21433.00	12.8%	-10.3%	202943.61	British American Tobacco PLC	64700.00	-4.3%	10.4%	181946.30
Prosus NV	12886.00	9.3%	-24.6%	180404.94	Bidvest Group Ltd	21524.00	-2.8%	13.6%	28677.22
Naspers Ltd	238728.00	8.4%	-3.4%	302448.56	Bid Corp Ltd	29677.00	-1.9%	-9.1%	23094.40
Anglo American PLC	67947.00	6.9%	5.3%	204639.78	Clicks Group Ltd	29715.00	-1.9%	-5.8%	20881.41
Northam Platinum Ltd	18514.00	4.5%	-11.6%	55828.91	MultiChoice Group	12071.00	-1.9%	-1.1%	11316.90
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)
Woolworths Holdings Ltd	6643.00	6709.00	-1.0%	27062.51	Bid Corp Ltd	29677.00	27118.00	9.4%	23094.40
Investec PLC	9660.00	9835.00	-1.8%	18945.76	Clicks Group Ltd	29715.00	26993.00	10.1%	20881.41
Investec Ltd	9542.00	9830.56	-2.9%	7591.99	MultiChoice Group	12071.00	10925.00	10.5%	11316.90
Absa Group Ltd	19823.00	20436.00	-3.0%	54529.96	Mr Price Group Ltd	18276.00	16455.00	11.1%	9556.78
Standard Bank Group Ltd	17900.00	18798.00	-4.8%	49987.16	Vodacom Group Ltd	12886.00	11562.00	11.5%	18521.18

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Masan Group Corp	86500.00	6.8%	-38.9%	91266.15	Phat Dat Real Estate Development Corp	26200.00	-6.9%	-62.5%	5758.76
Khang Dien House Trading & Investment	20200.00	6.3%	-56.4%	71871.60	No Va Land Invest	41850.00	-6.9%	-54.0%	28349.19
Asia Commercial JS Bank	20800.00	4.0%	-24.6%	89970.40	FPT Corp	72800.00	-0.3%	-5.0%	73011.12
Bank for Inv. and Devp	36000.00	3.7%	-3.0%	77961.60					
Vietnam JSC Bank	23600.00	3.7%	-30.4%	231055.80					
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.	187800.00	203000.00	-7.5%	30423.60	No Va Land Invest	41850.00	41850.00	0.0%	28349.19
Vinamilk	78400.00	85672.94	-8.5%	122648.96	Phat Dat Real Estate Development Corp	26200.00	26200.00	0.0%	5758.76
Petrovietnam Gas	113900.00	130442.43	-12.7%	19374.39	Saigon Securities Inc	14100.00	13800.00	2.2%	280024.59
Vietcombank	75500.00	96000.00	-21.4%	99222.10	Vietnam Rubber Group JSC	12300.00	12000.00	2.5%	746808.03
FPT Corp	72800.00	97944.43	-25.7%	73011.12	Hoa Phat Group JSC	12300.00	12000.00	2.5%	746808.03

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