

Daily Market Report

15 November 2022

JSE

JSE All-Share Index decreased by 0.22% and closed at 72,822.50 points on Monday, as the Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index dropped by 1.20% and closed at 192.89 points on Monday, with Solibra Côte d'Ivoire and Sogb Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index decreased by 0.34% to close at 43,818.12 points on Monday, as the Oil & Gas sector recorded losses.

EGX

EGX 30 Index climbed by 1.30% and closed at 12,136.37 points on Monday, as the market gained LE 6.3 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index surged by 1.77% to close at 782.78 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.22%
BRVM Bourse Régionale des Valeurs Mobilières	▼	1.20%
NGX Nigerian Stock Exchange	▼	0.34%
EGX Egyptian Stock Exchange	▲	1.30%
ESG Casablanca Stock Exchange	▲	1.77%

African Markets

Nigeria: NGX 30 Index decreased by 0.37% to close at 1581.50 points on Monday. MTNN and UBA were the top losers.

Egypt: EGX 30 Index climbed by 1.30% and closed at 12,136.37 points on Monday, as the market gained LE 6.3 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index declined by 0.63% and closed at 1,655.89 points on Monday. Centum Investment Company and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index decreased by 0.25% and closed at 66,289.25 points on Monday, as the Industrial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	20.77%
Exchange Rate	₦ 441.83
INTERBANK RATES	
OPR	15.33 ▲
Overnight	15.83 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.09% to close at 10,620.26 points on Monday, as losses in the Financials, Utilities, and Real Estate sectors pushed shares lower. MSCI UAE was down by 0.14% to close at 444.61 points.

Vietnam: VN-30 Index dropped by 1.32% to close at 936.31 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam decreased by 0.25% to close at 592.00 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.44% to close at 11,197.46 points on Monday, as losses in the Pharma, Consumer Durables & Apparel, and Retailing sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.46% to close at 1,553.90 points.

India: Nifty 50 Index was down by 0.11% to close at 18,329.15 points on Monday, as losses in the Bank, FMCG, and Media sectors pushed shares lower. MSCI India inched down by 0.001% to close at 2,111.16 points.

News

Nigeria:

EU turns to Nigeria for Gas supply, seeks 22 million tons per year
Forex inflows hit 19-month low as investors shun CBN's incentives
Fed Govt seeks N225b in new bond auction

Kenya:

Banks to give 4.2m mobile borrowers 50% discount on unpaid loans
Treasury Unveils Regulations to Govern KES 50 Bn Hustler Fund
Relief for Absa bank in Sh1.5 bn secret information leakage order

Abu Dhabi:

Abu Dhabi expects IPO boom to continue, with 11 deals next year
Abu Dhabi's \$1.4bn IPO fund shortlists six companies for listing on ADX
AD Ports Group net profit surges 77% in Q3-22

Saudi Arabia:

OPEC cuts oil demand growth forecast again as economic challenges mount
Aramco inks hydrogen agreement as Bezos, Musk & Blair address B20 gathering
PIF, BlackRock sign MoU to explore infrastructure projects in Saudi Arabia

Egypt:

International Coop Ministry signs \$15B LOIs, agreements in COP27
EBRD invests \$10B in Egypt's clean energy sector
Egyptian Senate passes amendments to Investment Law

South Africa:

Vodacom sees higher H2 profit after hit from Ethiopia roll-out
Shoprite Q1 sales jump as shoppers look for discounts
SA sets sights on \$250bn investment in hydrogen sector

India:

Retail inflation falls to 6.77% in October: Govt data
WPI inflation eases to 19-month low of 8.39% in October
L&T merges IT services companies into LTI-Mindtree
Vietnam:
NA green-light private sector's participation in amended Petroleum Law
M&A in renewable energy recorded despite economic downturn
VIB plans to pay cash dividend up to 35 per cent

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,620.26	-0.1%	-0.1%	2.0%	25.1%	AED/USD	3.67	0.0%	0.0%
Egypt	12,136.37	1.3%	3.2%	6.7%	1.9%	EGP/USD	24.46	0.3%	55.7%
India	18,329.15	-0.1%	-0.1%	1.8%	5.6%	INR/USD	81.26	0.6%	9.3%
Kenya	1,655.89	-0.6%	-0.6%	-1.3%	-13.0%	KES/USD	121.90	0.0%	7.7%
Nigeria	1,581.50	-0.4%	-0.4%	0.1%	-8.2%	NGN/USD	443.75	0.3%	7.3%
Saudi Arabia	11,197.46	-0.4%	-0.1%	-4.0%	-1.2%	SAR/USD	3.76	-0.1%	0.1%
South Africa	66,289.25	-0.2%	-0.2%	10.4%	-1.1%	ZAR/USD	17.28	0.1%	8.3%
Vietnam	936.31	-1.3%	-1.3%	-8.8%	-39.0%	VND/USD	24,745.00	-0.3%	8.6%

MSCI Emerging Markets

MSCI Frontier	456.12	0.3%	0.3%	-0.4%	-31.5%	Brent Crude (\$)	93.14	-3.0%	19.7%
MSCI Frontier 100	1,052.88	-0.2%	-0.2%	-0.5%	-31.3%	Gold (\$)	1,774.20	0.0%	-3.0%
MSCI Emerging	939.78	0.4%	0.4%	10.8%	-23.7%	Copper (\$)	8,375.00	-1.4%	-13.8%
MSCI World (USD)	2,653.94	-0.8%	-0.8%	4.2%	-17.9%	Coffee (\$)	159.72	0.8%	-19.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	1.62	5.9%	-27.4%	0.91	MTNN	187.40	-2.4%	3.0%	764.37
UBN	5.95	3.5%	-1.7%	4.31	UBA	7.05	-2.1%	-11.9%	7.40
FBNH	10.50	2.4%	-8.7%	40.72	United Capital PLC	12.00	-0.8%	21.2%	11.95
Transnational Corporation	1.10	1.9%	11.1%	11.61					
Sterling	1.43	1.4%	-4.7%	2.81					
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%	0.07	Guaranty	17.70	17.70	0.0%	66.07
Transcorp Hotels	6.25	6.25	0.0%	0.28	Unilever	10.00	10.00	0.0%	0.95
Total	197.00	197.00	0.0%	3.87	Nascon	9.50	9.00	5.6%	0.28
Seplat Petroleum	1088.90	1088.90	0.0%	0.20	Cap	16.90	15.25	10.8%	1.13
P Z Cussons	8.60	8.60	0.0%	0.31	Stanbic IBTC	27.50	24.50	12.2%	11.22

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	0.48	10.2%	-18.8%	0.00	Abu Dhabi National Takaful	4.16	-10.0%	-32.5%	0.01
APEX INVESTMENT P.S.C	4.05	5.7%	-39.6%	49.38	PALMS SPORTS	10.50	-7.1%	-14.1%	0.25
Abu Dhabi Ports Company	6.10	3.4%	68.5%	93.16	Bayanat AI PLC	3.85	-5.2%	-6.1%	31.01
Hayah Insurance Company	1.13	2.7%	73.8%	0.95	OOREDOO	9.01	-5.2%	38.6%	0.00
GFH Financial Group B.S.C	0.98	2.6%	-16.3%	1.63	Ras Al Khaimah Poultry & Feeding	1.80	-4.8%	-22.7%	0.01
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	Sawaeed 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	Abu Dhabi National Takaful	4.16	4.16	0.0%	0.01

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Fawry For Banking Tech And Electronic Payment	4.22	6.6%	-39.1%	162.96	Oriental Weavers	7.58	-5.3%	-12.8%	35.27
Eastern Company	13.36	3.6%	24.6%	43.33	Cairo For Investment And Real Estate Development	12.75	-3.4%	-6.3%	0.61
Palm Hills Development Co.	1.51	3.6%	-24.1%	29.64	GB AUTO	4.32	-2.7%	-15.3%	36.67
Tenth Of Ramadan Pharma Industries & Diagnostic	2.78	3.0%	15.8%	7.00	Egyptian Financial Group	13.46	-1.5%	9.1%	78.71
Commercial International Bank	35.90	2.3%	1.9%	1700.76	Egyptian Kuwaiti Holding-EGP	28.00	-1.0%	42.5%	9.96
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£)
Commercial International Bank	35.90	36.21	-0.9%	1700.76	Oriental Weavers	7.58	6.30	20.3%	35.27
Eastern Company	13.36	13.59	-1.7%	43.33	Cleopatra Hospital Company	4.72	3.81	23.9%	31.24
Telecom Egypt	21.50	21.96	-2.1%	38.69	Alexandria Mineral Oils Company	4.07	3.21	26.8%	5.65
Ezz Steel	17.55	18.00	-2.5%	11.02	Qatar National Bank Alahly	14.89	11.66	27.7%	1.93
Misir Fertilizers Production Company - Mopco	116.25	120.50	-3.5%	14.32	Juhayna Food Industries	7.13	5.46	30.6%	0.22

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	454.60	5.8%	-4.4%	13604.184	Dr Reddys Lab	4368.00	-3.8%	-11.0%	3245.63
Apollo Hospitals Enterprise	4546.35	2.8%	-9.5%	4020.77	Coal India	246.90	-2.5%	69.1%	4684.29
Tata Motors	433.50	2.4%	-10.1%	7808.86	ITC	347.45	-2.5%	59.3%	6178.55
Grasim Industries	1745.95	2.2%	7.6%	2722.42	HUL	2458.00	-1.8%	4.1%	5276.92
Power Grid Corp Of India	211.95	1.4%	3.7%	2926.83	State Bank Of India	592.50	-1.5%	28.7%	7723.57
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Britannia Inds.	4106.00	4237.00	-3.1%	1382.82	Wipro	396.50	372.40	6.5%	3506.80
Larsen & Toubro	1999.55	2078.55	-3.8%	2354.16	Bharat Petroleum	307.45	288.05	6.7%	401.30
ITC	347.45	361.45	-3.9%	6178.55	HDFC Life Insurance Company	538.90	497.05	8.4%	1106.86
Cipla	1129.00	1185.25	-4.7%	1688.46	Tech Mahindra	1063.80	943.70	12.7%	2379.70
Nestle India Limited	20050.00	21050.00	-4.8%	974.53	Tata Consultancy Svs.	3332.00	2926.10	13.9%	4472.90

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	24.60	6.0%	-1.6%	0.04	Centum Investment Company	8.08	-4.0%	-42.7%	0.23
Equity Group Holdings	45.85	1.7%	-13.1%	20.59	Nairobi Securities Exchange	7.04	-3.3%	-6.4%	0.04
Kenya Reinsurance Corp Ltd	1.89	1.1%	-17.8%	0.15	NCBA Group	30.75	-3.0%	22.0%	0.62
KCB Group Plc	37.05	0.8%	-18.5%	5.15	Diamond Trust Bank Limited	47.50	-2.1%	-20.2%	2.47
East African Breweries Limited	158.75	0.8%	-3.8%	0.70	Kenya Power & Lighting Limited	1.63	-1.2%	-6.9%	1.39
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)
Total Kenya Ltd	24.60	26.40	-6.8%	0.04	Kengen Limited	3.27	3.25	0.6%	0.48
Stanbic Holdings	100.00	108.00	-7.4%	1.88	Centum Investment Company	8.08	8.00	1.0%	0.23
NCBA Group	30.75	33.25	-7.5%	0.62	Diamond Trust Bank Limited	47.50	46.05	3.1%	2.47
Standard Chartered Bank Kenya Ltd	137.25	148.75	-7.7%	2.00	Kenya Reinsurance Corp Ltd	1.89	1.80	5.0%	0.15
East African Breweries Limited	158.75	174.75	-9.2%	0.70	British American Tobacco Kenya Ltd	425.00	400.00	6.3%	38.17

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Fawaz Abdulaziz Alhokair Co.	17.04	9.9%	9.5%	31.57	Saudi Arabian Amiantit Co.	42.00	-10.0%	134.6%	121.28
Abdulmohsen Alhokair Group for Tourism and Development	19.90	9.9%	15.2%	23.60	Tourism Enterprise Co.	158.00	-6.5%	-7.1%	89.10
Raydan Food Co.	29.45	9.9%	45.8%	13.61	Saudi Tadawul Group Holding Co.	177.20	-6.1%	40.9%	427.77
Arab Sea Information System Co.	76.60	7.7%	-60.9%	60.39	Saudi Enaya Coop Insurance Co.	15.80	-6.0%	-49.2%	5.36
Saudi Arabian Fertilizer Co.	42.80	6.9%	-58.2%	25.45	Saudi Paper Manufacturing Co.	25.70	-4.5%	-43.5%	7.52
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.	141.60	141.60	0.0%	11.34	Al Alamiya for Coop Insurance Co.	13.40	13.40	0.0%	0.98
Retal Urban Development Co.	131.60	131.60	0.0%	6.41	Al Kathiri Holding Co.	40.70	40.70	0.0%	9.54
Nahdi Medical Co.	194.00	194.00	0.0%	41.50	Alkhabeer REIT Fund	7.82	7.82	0.0%	1.49
Elm Co.	302.00	302.00	0.0%	127.89	AXA Coop Insurance Co.	0.00	0.00	0.0%	0.00
Saudi Tadawul Group Holding Co.	177.20	177.20	0.0%	427.77	CHUBB Arabia Coop Insurance Co.	17.04	17.04	0.0%	0.85

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Holdings Ltd	25490.00	7.8%	22.0%	83933.78	Vodacom Group Ltd	12083.00	-6.2%	-10.2%	46410.89
British American Tobacco PLC	12083.00	3.1%	13.9%	45011.69	MultiChoice Group	11730.00	-2.8%	-3.9%	11417.34
Exxaro Resources Ltd	22078.00	1.7%	44.4%	15639.46	MTN Group	13259.00	-2.0%	-22.3%	46617.78
NEPI Rockcastle PLC	9769.00	1.6%	-7.8%	9725.92	Reinet Investments	29728.00	-1.8%	3.9%	6510.02
Mr Price Group Ltd	18547.00	1.5%	-7.0%	13504.27	Naspers Ltd	234889.00	-1.6%	-5.0%	164228.28
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)
Shoprite Holdings Ltd	25490.00	25490.00	0.0%	83933.78	Vodacom Group Ltd	12083.00	11562.00	4.5%	46410.89
Woolworths Holdings Ltd	6690.00	6715.00	-0.4%	37552.81	MultiChoice Group	11730.00	10925.00	7.4%	11417.34
Absa Group Ltd	20014.00	20436.00	-2.1%	34832.87	Bid Corp Ltd	29460.00	27118.00	8.6%	29348.99
Investec PLC	9605.00	9835.00	-2.3%	10863.85	Clicks Group Ltd	29666.00	26993.00	9.9%	24963.70
Investec Ltd	9449.00	9830.56	-3.9%	5054.33	Mr Price Group Ltd	18547.00	16455.00	12.7%	13504.27

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Beer Alcohol Beverage Corp.	195000.00	3.8%	32.0%	46800.00	No Va Land Invest	38950.00	-6.9%	-57.2%	1141.24
Masan Group Corp	89100.00	3.0%	-37.0%	115135.02	Phat Dat Real Estate Development Corp	24400.00	-6.9%	-65.1%	122.00
Sai Gon Thuong Tin Commercial	15850.00	1.6%	-49.7%	585337.33	Mobile World Inv. Corp	40650.00	-5.5%	-39.8%	142856.30
Vingroup JSC	55000.00	1.3%	-42.2%	76703.00	Military Commercial Bank	15200.00	-5.0%	-36.9%	182839.28
Vietnam JSC Bank	23900.00	1.3%	-29.5%	215934.11	Vietnam Prosperity	15700.00	-3.7%	-34.2%	251221.98
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)
Saigon Beer Alcohol Beverage Corp.	195000.00	203000.00	-3.9%	46800.00	No Va Land Invest	38950.00	38950.00	0.0%	1141.24
Vinamilk	79000.00	85197.51	-7.3%	205147.20	Phat Dat Real Estate Development Corp	24400.00	24400.00	0.0%	122.00
Petrovietnam Gas	113800.00	130442.43	-12.8%	39875.52	Mobile World Inv. Corp	40650.00	40400.00	0.6%	142856.30
Vietcombank	75100.00	96000.00	-21.8%	115391.15	Military Commercial Bank	15200.00	15100.00	0.7%	182839.28
FPT Corp	70800.00	97944.43	-27.7%	116041.20	BaoViet Holdings	47600.00	46600.00	2.1%	38746.40

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