

# Daily Market Report

21 November 2022

## JSE

JSE All-Share Index increased by 0.58% and closed at 72,576.88 points on Friday, as the Resources and Financial sectors recorded gains.

## BRVM

BRVM Composite Index was down by 0.10% and closed at 193.56 points on Friday, with NEI-CEDA Côte d'Ivoire and Sitab Côte d'Ivoire being the top losers.

## NSE

NGX All-Share Index climbed by 1.09% to close at 44,492.73 points on Friday, as the Consumer goods, Banking, and Oil & Gas sectors recorded gains.

## EGX

EGX 30 Index inched up by 0.06% and closed at 12,523.84 points on Sunday, as the market gained LE 1.4 billion of market cap, Egyptian and foreign buying.

## ESG

Casablanca ESG 10 Index market was closed on Friday on account of Independence Day.

## Capital Markets

### JSE

Johannesburg Stock Exchange ▲ 0.58%

### BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.10%

### NGX

Nigerian Stock Exchange ▲ 1.09%

### EGX

Egyptian Stock Exchange ▲ 0.06%

### ESG

Casablanca Stock Exchange ↔ 0.00%

## African Markets

**Nigeria:** NGX 30 Index jumped by 1.27% to close at 1,608.12 points on Friday. Nigerian Breweries and UBN were the top gainers.

**Egypt:** EGX 30 Index inched up by 0.06% and closed at 12,523.84 points on Sunday, as the market gained LE 1.4 billion of market cap, Egyptian and foreign buying.

**Kenya:** NSE 20 Index increased by 0.34% and closed at 1,664.82 points on Friday. Equity Group Holdings and Nairobi Securities Exchange were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.60% and closed at 66,227.00 points on Friday, as the Resources and Financial sectors recorded gains.

## Nigeria Key Indicators

### Current

Inflation	21.09%
Exchange Rate	₦ 443.16

### INTERBANK RATES

OPR	16.25 <span style="color: blue;">↔</span>
Overnight	16.50 <span style="color: blue;">↔</span>

## Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.40% to close at 10,466.15 points on Friday, as gains in the Financials, Energy, and Industrials sectors led shares higher. MSCI UAE climbed by 0.99% to close at 434.13 points.

**Vietnam:** VN-30 Index inched up by 0.02% to close at 971.20 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam inched up by 0.03% to close at 621.04 points.

**Saudi Arabia:** Tadawul All Share Index declined by 0.80% to close at 11,053.16 points on Sunday, as losses in the Pharma, Consumer Durables & Apparel, and Retailing pushed shares lower. MSCI Saudi Arabia was down by 0.90% to close at 1,529.73 points.

**India:** Nifty 50 Index was down by 0.20% to close at 18,307.65 points on Friday, as losses in the Bank, IT, and Financial Services sectors pushed shares lower. MSCI India decreased by 0.28% to close at 2,096.54 points.

## News

### Nigeria:

Nigerian Breweries to give N85b bonus shares to shareholders

Mastercard, Afrexim bank to fund technological startups

Nigeria exported 36% value-added products in H1 – NEPC

### Kenya:

Kenyan Shilling Hits Record Low of KES 122 Against U.S Dollar

November power prices fall on lower fuel, forex charge

Google Bans Unlicensed Loan Apps in Kenya

### Abu Dhabi:

Abu Dhabi group signs key MRO agreements at B20 summit

Abu Dhabi's Masdar to start \$11bn Egypt wind farm construction in 2024

Abu Dhabi launches 'smart manufacturing' index

### Saudi Arabia:

Saudi Arabia and Thailand sign landmark agreements on energy

Siemens to add to Kingdom's EV drive with supply of chargers to Electromin

Saudi Arabia's Dar Al Arkan signs deal with Trump family for Oman project

### Egypt:

Egypt's agricultural exports rise 9.1% YoY in 11 months

Alexandria Port Authority inks MoU for 273-feddan logistics zone

World Bank discusses new cooperation phase with Egypt

### South Africa:

S&P gives SA positive rating on foreign and local currency debt

Govt 'hikes' wage offer to 7.5%, public wage bill may balloon to R700bn

Premier bets on bread business growth, exports for profit boost

### India:

At \$14.7bn, forex kitty posts biggest weekly jump in a yr

ONGC to reverse oil, gas output decline; sees 18% jump in production in FY25

Economy likely grew 6.1-6.3% in Q2: RBI

### Vietnam:

Large bond investment funds' NAV hit three-year low

Banks race to attract low-cost capital sources Over 7 million EUR to aid delta farmers' green production

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,466.15	0.4%	0.0%	0.5%	23.3%	AED/USD	3.67	0.0%	0.0%
Egypt	12,523.84	0.1%	0.1%	10.1%	5.2%	EGP/USD	24.52	0.0%	56.0%
India	18,307.65	-0.2%	0.0%	1.6%	5.5%	INR/USD	81.69	0.0%	9.9%
Kenya	1,664.82	0.3%	0.0%	-0.8%	-12.5%	KES/USD	122.10	0.1%	7.9%
Nigeria	1,608.33	1.3%	0.0%	1.8%	-6.6%	NGN/USD	442.50	0.0%	6.9%
Saudi Arabia	11,053.16	-0.8%	-0.8%	-5.3%	-2.5%	SAR/USD	3.76	0.0%	0.1%
South Africa	66,227.00	0.6%	0.0%	10.3%	-1.2%	ZAR/USD	17.23	-1.1%	7.9%
Vietnam	971.20	0.02%	0.0%	-5.4%	-36.8%	VND/USD	24,807.50	0.0%	8.9%

## MSCI Emerging Markets

MSCI Frontier	465.72	0.2%	0.0%	1.7%	-30.0%	Brent Crude (\$)	87.62	-2.4%	12.7%
MSCI Frontier 100	1,073.60	0.2%	0.0%	1.4%	-30.0%	Gold (\$)	1,769.00	0.3%	-3.3%
MSCI Emerging	943.01	0.1%	0.0%	11.2%	-23.5%	Copper (\$)	8,076.00	-0.4%	-16.9%
MSCI World (USD)	2,658.90	0.6%	0.0%	4.4%	-17.7%	Coffee (\$)	151.76	-0.6%	-23.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	41.25	10.0%	-14.1%	76.77	Access	8.10	-2.4%	-11.0%	49.28
UBN	6.50	9.2%	7.4%	9.76	Wema	3.06	-1.9%	287.3%	6.96
Axamansard	1.77	7.3%	-20.6%	3.30	FCMB	3.25	-1.2%	9.1%	2.83
United Capital	12.05	6.6%	21.7%	12.02	UBA	7.15	-0.7%	-10.6%	33.57
International Breweries	4.25	6.3%	-9.6%	10.90					
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	3.06	3.06	0.0%	6.96	Unilever	11.00	10.50	4.8%	0.69
Transcorp Hotels	6.25	6.25	0.0%	0.03	Nascon	9.50	9.00	5.6%	1.22
Total	197.00	197.00	0.0%	1.12	Guaranty	19.45	18.00	8.1%	69.29
Seplat Petroleum	1088.90	1088.90	0.0%	50.88	Cap	16.90	15.25	10.8%	1.16
P Z Cussons	8.60	8.60	0.0%	2.45	Custodian	5.35	4.55	17.6%	0.10

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
United Arab Bank	0.84	14.9%	24.7%	0.74	Al Dhafra Insurance Co.	5.40	-10.0%	20.5%	0.03
Insurance House	0.90	13.6%	-0.9%	0.00	Sharjah Cement and Industrial Development Co.	0.60	-5.8%	-21.8%	0.02
Abu Dhabi National Takaful Co.	5.29	10.7%	-14.1%	0.05	Bayanat Al	3.85	-5.2%	-6.1%	31.01
National Corp for Tourism & Hotels	2.50	10.6%	-16.7%	0.13	Response Plus Holding	5.75	-1.5%	-40.4%	9.23
Fertiglobe	4.72	3.7%	34.1%	45.51	Abu Dhabi Aviation Co.	6.49	-1.5%	32.4%	3.59
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	The National Investor	0.45	0.45	0.0%	0.00
Al Buhaira National Insurance Co.	2.30	2.30	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Al Fujairah National Insurance Co.	224.00	224.00	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Invest Bank	0.45	0.45	0.0%	0.00
Finance House	2.15	2.15	0.0%	0.00	Emirates Insurance Co.	6.80	6.80	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£)
Misr Fertilizers Production Co.	124.18	3.6%	27.4%	40.06	Cleopatra Hospital Company	4.41	-4.1%	-10.4%	3.73
ELSWEDY ELECTRIC	9.17	2.7%	-6.7%	38.91	E-finance For Digital and Financial Investments	16.45	-2.4%	-18.9%	12.39
Credit Agricole Egypt	8.07	2.5%	-4.2%	6.62	Telecom Egypt	21.54	-2.4%	28.4%	13.58
Egyptian Kuwaiti Holding	29.16	2.3%	48.4%	129.46	Alexandria Mineral Oils Company	4.17	-1.4%	13.9%	6.68
Abou Kir Fertilizers	29.81	1.2%	38.7%	56.27	Ezz Steel	16.95	-1.2%	13.1%	6.61
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	37.40	37.80	-1.1%	141.25	Cleopatra Hospital Company	4.41	3.81	15.7%	3.73
Eastern Company	14.69	14.85	-1.1%	18.16	Oriental Weavers	7.51	6.30	19.2%	26.09
Egyptian Kuwaiti Holding	29.16	29.90	-2.5%	129.46	Qatar National Bank Alahly	15.13	11.66	29.8%	1.68
Alexandria Containers and goods	13.05	13.51	-3.4%	2.12	Alexandria Mineral Oils Company	4.17	3.21	29.9%	6.68
Tenth Of Ramadan Pharma Industries & Diagnostic	3.06	3.17	-3.5%	0.79	T M G Holding	8.48	6.50	30.5%	2.00

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hcl Technologies	1105.00	1.1%	-16.2%	2865.135	Mahindra & Mahindra	1227.70	-2.5%	46.7%	5576.15
Asian Paints	3100.00	0.9%	-8.4%	3886.32	Bajaj Auto	3627.85	-1.8%	11.7%	1194.85
HUL	2481.00	0.9%	5.1%	2653.28	NTPC	165.50	-1.7%	33.0%	1852.63
State Bank Of India	602.05	0.5%	30.8%	7774.69	Bajaj Finance	6785.00	-1.6%	-2.8%	9049.41
Infosys	1594.40	0.4%	-15.5%	4959.06	Indusind Bank	1128.55	-1.6%	27.1%	2359.22
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	921.00	943.25	-2.4%	9954.44	Bharat Petroleum	303.80	288.05	5.5%	617.83
Larsen & Toubro	2022.00	2078.55	-2.7%	2523.60	Wipro	394.90	372.40	6.0%	1882.22
Britannia Inds.	4111.45	4237.00	-3.0%	1148.89	HDFC Life Insurance Co. Ltd	530.40	497.05	6.7%	1033.02
State Bank Of India	602.05	622.70	-3.3%	7774.69	Tech Mahindra	1061.00	943.70	12.4%	1705.15
Nestle India Limited	19900.00	21050.00	-5.5%	728.95	Tata Consultancy Svs.	3343.50	2926.10	14.3%	3890.59

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Equity Group Holdings	46.80	2.5%	-11.3%	1.15	Stanbic Holdings	97.50	-2.3%	11.7%	0.54
Nairobi Securities Exchange	6.94	1.8%	-7.7%	0.02	KCB Group	38.80	-1.6%	-14.6%	5.43
NCBA Group	30.60	1.7%	21.4%	0.13	WPP Scangroup	3.01	-1.3%	-27.3%	0.03
The Coop Bank of Kenya Ltd	12.00	0.8%	-7.3%	5.98	Kenya Reinsurance Corp Ltd	1.83	-1.1%	-20.4%	0.11
East African Breweries Limited	165.25	0.8%	0.2%	31.98	Kengen Limited	3.27	-0.6%	-22.0%	0.74
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	165.25	174.75	-5.4%	31.98	Kengen Limited	3.27	3.25	0.6%	0.74
Standard Chartered Bank Kenya Ltd	138.75	148.75	-6.7%	4.43	Kenya Reinsurance Corp Ltd	1.83	1.80	1.7%	0.11
NCBA Group	30.60	33.25	-8.0%	0.13	Diamond Trust Bank Limited	47.40	46.05	2.9%	0.89
Absa Bank Kenya	11.70	12.95	-9.7%	1.00	Centum Investment Co.	8.50	8.00	6.3%	0.68
Stanbic Holdings	97.50	108.00	-9.7%	0.54	Nation Media Group	16.00	15.00	6.7%	0.03

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Company for Learning and Education	68.50	8.6%	14.2%	9.58	Tourism Enterprise Co.	141.40	-9.9%	-16.8%	85.35
United Coop Assurance Co.	8.52	3.2%	-74.9%	18.32	Arabia Insurance Coop Co.	12.34	-4.9%	-68.8%	8.54
Abdulmohsen Alhokair Group for Tourism and Development	21.26	2.7%	23.0%	9.84	Ethad Atheeb Telecom Co.	56.90	-4.1%	93.5%	17.36
Halwani Bros. Co.	54.00	2.5%	-40.6%	5.06	Leejam Sports Co.	80.40	-3.8%	-26.2%	22.97
Al Hammadi Company for Development and Investment	42.00	2.4%	4.2%	5.25	Abdullah Saad Mohammed Abo Moati for Bookstores	29.80	-3.7%	-23.1%	4.74
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.	149.00	149.00	0.0%	3.61	Al Alamiya for Coop Insurance Co.	13.52	13.52	0.0%	0.65
Nahdi Medical Co.	195.00	195.00	0.0%	13.35	Al Kathiri Holding	39.70	39.70	0.0%	3.05
Elm Co.	298.00	298.00	0.0%	27.39	Alkhabeer REIT Fund	7.60	7.60	0.0%	1.85
Saudi Tadawul Group Holding Co.	168.00	168.00	0.0%	68.76	Aseer Trading, Tourism and Manufacturing Co.	0.00	0.00	0.0%	0.00
ACWA POWER Co.	140.80	140.80	0.0%	21.06	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)
Old Mutual Ltd	1115.00	4.2%	-14.9%	12304.41	Woolworths Holdings Ltd	6700.00	-2.5%	29.2%	35960.62
Bid Corp Ltd	19295.00	3.7%	-5.8%	28478.07	Exxaro Resources	21151.00	-2.0%	38.4%	11665.77
Investec Ltd	9678.00	3.1%	18.0%	12399.90	Gold Fields Ltd	18033.00	-1.4%	3.6%	57838.45
NEPI Rockcastle	9964.00	2.9%	-6.0%	11654.33	Sasol Ltd	29718.00	-1.4%	14.7%	43470.81
Investec	9825.00	2.6%	21.1%	12315.40	Glencore	10350.00	-1.3%	30.1%	20378.90
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)
Absa Group Ltd	20224.00	20436.00	-1.0%	36586.83	Vodacom Group Ltd	12204.00	11562.00	5.6%	19459.61
Investec	9825.00	9935.00	-1.1%	12315.40	SPAR Group Ltd	13733.00	12909.00	6.4%	26312.14
Investec Ltd	9678.00	9830.56	-1.6%	12399.90	MultiChoice Group	11786.00	10925.00	7.9%	9327.92
Shoprite Holdings Ltd	24784.00	25490.00	-2.8%	19936.62	Clicks Group Ltd	29623.00	26993.00	9.7%	10022.05
Standard Bank Group Ltd	17886.00	18798.00	-4.9%	37053.85	Mr Price Group Ltd	18522.00	16455.00	12.6%	15442.55

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Hoa Phat Group	15100.00	6.0%	-57.0%	1504847.88	Phat Dat Real Estate Development Corp	18350.00	-6.9%	-73.7%	3633.30
Vietnam Rubber Group	15100.00	6.0%	-57.0%	1504847.88	No Va Land Invest	29250.00	-6.8%	-67.9%	37156.28
Saigon Securities Inc	16250.00	2.8%	-64.7%	562194.75	Petrovietnam Gas	114300.00	-4.5%	22.1%	45559.98
Khang Dien House Trading & Investment	22100.00	2.6%	-52.3%	100795.89	Vincom Retail	27600.00	-2.8%	-8.3%	53452.92
BaoViet Holdings	48300.00	1.9%	-13.8%	37456.65	Vietnam National Petroleum Group	25100.00	-2.1%	-51.5%	28212.40
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
Vinamilk	77000.00	84436.81	-8.8%	171656.10	No Va Land Invest	29250.00	29250.00	0.0%	37156.28
Saigon Beer Alcohol Beverage Corp.	179200.00	203000.00	-11.7%	52935.68	Phat Dat Real Estate Development Corp	18350.00	18350.00	0.0%	3633.30
Petrovietnam Gas	114300.00	130442.43	-12.4%	45559.98	Vietjet Aviation	102200.00	96100.00	6.3%	32479.16
Vietcombank	76500.00	96000.00	-20.3%	119707.20	Vietnam National Petroleum Group	25100.00	22950.00	9.4%	28212.40
Vincom Retail	27600.00	37000.00	-25.4%	53452.92	Tien Phong Commercial Joint Stock Bank	20600.00	18300.00	12.6%	42052.84

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