

Daily Market Report

25 November 2022

JSE

JSE All-Share Index increased by 0.32% and closed at 73,127.31 points on Thursday, as the Resources and Industrial sectors recorded gains.

BRVM

BRVM Composite Index was down by 0.15% and closed at 193.69 points on Thursday, with Tractafric Motors Côte d'Ivoire and Uniwax Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.81% to close at 46,604.94 points on Thursday.

EGX

EGX 30 Index jumped by 1.42% and closed at 12,779.40 points on Thursday, as the market gained LE 7.5 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index decreased by 0.48% to close at 815.11 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.32%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.15%
NGX Nigerian Stock Exchange	▲	0.25%
EGX Egyptian Stock Exchange	▲	1.42%
ESG Casablanca Stock Exchange	▼	0.48%

African Markets

Nigeria: NGX 30 Index increased by 0.25% to close at 1,682.09 points on Thursday. Nigerian Breweries and Ecobank were the top gainers.

Egypt: EGX 30 Index jumped by 1.42% and closed at 12,779.40 points on Thursday, as the market gained LE 7.5 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index inched down by 0.06% and closed at 1,643.03 points on Thursday. Diamond Trust Bank and The Cooperative Bank of Kenya were the top losers.

South Africa: JSE Top 40 Index increased by 0.37% and closed at 66,764.88 points on Thursday, as the Resources and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 443.76
INTERBANK RATES	
OPR	9.63 ▼
Overnight	9.88 ▼

Other Emerging Markets

Abu Dhabi: ADX Index inched up by 0.06% to close at 10,534.66 points on Thursday, as gains in the Financials, Energy, and Utilities sectors led shares higher. MSCI UAE increased by 0.37% to close at 435.01 points.

Vietnam: VN-30 Index increased by 0.22% to close at 940.76 points on Thursday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.44% to close at 596.99 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.24% to close at 10,938.75 points on Thursday, as losses in the Pharma, Diversified Financials and Food & Staples Retailing sectors pushed shares lower. MSCI Saudi Arabia inched down by 0.08% to close at 1,518.30 points.

India: Nifty 50 Index climbed by 1.19% to close at 18,484.10 points on Thursday, as gains in the Bank, Auto, and Financial Services sectors led shares higher. MSCI India increased by 1.05% to close at 2,112.60 points.

News

Nigeria:

Economic downturn hits manufacturers, oil, services firms
CBN disburses N1tn to Anchor Borrowers Programme farmers
FG canvasses alternative funding for public varities

Kenya:

CBK Raises Base Lending Rate by 50bps to 8.75%
NCBA Reports a 96% Growth in Profits to KES 12.8 Billion in Q3
NCBA writes off Sh11bn Fuliza, M-Shwari loans

Abu Dhabi:

Abu Dhabi economy grows 11.2% in H1, GDP hits \$148bn
UAE's deal-hungry IHC plans health and IT business IPOs
Abu Dhabi DED digitally links four free zones in the emirate

Saudi Arabia:

Saudi's non-oil exports surge 13% in Q3 driven by chemical and allied industries
SABIC and Aramco plan to start crude-to-chemicals project in Ras Al-Khair
Saudi CMA approves registration and IPO of Aramco's Luberef shares

Egypt:

El-Sisi endorses €776.9M loan agreement with France
Investments in Egypt's ICT sector to hit LE67.1B in FY 2022/23
Naia Devpts intends to invest EGP 30bn in Egypt's property market over 3 years

South Africa:

Sarb ratchets repo rate by another 75bps
Clicks acquires the rest of Sorbet in R105m deal
Mr Price sees spike in credit demand, as customers come under pressure

India:

India to grow at 'moderately brisk rate', inflation to ease: Finance ministry
Adani's board to meet today to decide on Rs 20,000 cr FPO
India's unemployment rate dips to 7.2% in July-Sept 2022

Vietnam:

Vietnam, Philippines look toward 10 bln USD in trade by 2026
Vietnam eyes to boost economic, education cooperation with Hong Kong
Việt Nam, Poland to expand trade, investment ties

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,534.66	0.1%	0.7%	1.2%	24.1%	AED/USD	3.67	0.0%	0.0%
Egypt	12,779.44	1.4%	2.1%	12.4%	7.3%	EGP/USD	24.58	0.1%	56.4%
India	18,484.10	1.2%	1.0%	2.6%	6.5%	INR/USD	81.63	-0.3%	9.8%
Kenya	1,643.03	-0.1%	-1.3%	-2.1%	-13.6%	KES/USD	122.25	0.0%	8.0%
Nigeria	1,682.09	0.3%	4.6%	6.5%	-2.3%	NGN/USD	443.50	0.0%	7.2%
Saudi Arabia	10,938.75	-0.2%	-1.8%	-6.2%	-3.5%	SAR/USD	3.76	0.0%	0.1%
South Africa	66,764.88	0.4%	0.8%	11.2%	-0.4%	ZAR/USD	17.02	0.0%	6.6%
Vietnam	940.76	0.2%	-3.1%	-8.4%	-38.7%	VND/USD	24,838.00	0.0%	9.0%

MSCI Emerging Markets

MSCI Frontier	462.79	0.3%	-0.6%	1.1%	-30.5%	Brent Crude (\$)	85.41	-3.3%	9.8%
MSCI Frontier 100	1,073.32	0.3%	0.0%	1.4%	-30.0%	Gold (\$)	1,760.40	0.3%	-3.7%
MSCI Emerging	945.57	1.4%	0.3%	11.5%	-23.2%	Copper (\$)	8,005.00	-0.1%	-17.6%
MSCI World (USD)	2,706.01	0.3%	1.8%	6.2%	-16.3%	Coffee (\$)	155.93	-0.8%	-21.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Axamansard	1.90	8.6%	-14.8%	0.50	Nestle	1071.00	-10.0%	-24.3%	113.14
Nigerian Breweries	48.00	6.8%	0.0%	55.53	Lafarge Africa	21.10	-6.2%	-11.0%	39.76
Ecobank	10.65	6.5%	27.5%	107.58	International Breweries	4.40	-5.4%	-6.4%	2.98
Airtel Africa	1350.00	6.3%	41.4%	791.28	United Capital	12.50	-3.8%	26.3%	20.05
FCMB	3.28	0.3%	10.1%	11.66	Seplat Petroleum	1050.00	-3.6%	61.5%	123.36
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	3.10	3.10	0.0%	11.15	Unilever	11.00	10.50	4.8%	0.47
Transcorp Hotels	6.25	6.25	0.0%	0.07	Nascon	9.70	9.00	7.8%	0.10
Total	193.00	193.00	0.0%	10.65	Cap	16.90	15.25	10.8%	3.77
Seplat Petroleum	1050.00	1050.00	0.0%	123.36	Guaranty	20.30	18.00	12.8%	143.87
P Z Cussons	9.50	9.50	0.0%	1.88	Custodian	5.35	4.55	17.6%	0.52

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Takaful Co.	5.53	15.0%	-10.2%	0.00	Bayanat Al	3.85	-5.2%	-6.1%	31.01
Abu Dhabi National Co. for Building Materials	0.19	10.0%	-24.9%	0.14	Arkan Building Materials Co.	1.93	-2.5%	35.9%	35.94
Gulf Medical Projects Co.	2.00	8.1%	17.6%	0.01	Response Plus Holding	5.50	-2.3%	-43.0%	8.92
National Corp for Tourism & Hotels	2.60	4.0%	-13.3%	0.30	GHITHA HOLDING	69.00	-2.1%	150.9%	43.45
Fujairah Cement Industries	0.45	3.0%	-23.1%	0.00	Bank of Sharjah	0.49	-2.0%	-21.1%	0.31
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	Insurance House	0.74	0.74	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£)
GB AUTO	4.79	6.9%	-6.1%	85.35	Qatar National Bank Alahly	16.70	-1.8%	-5.7%	2.11
Alexandria Containers and goods	14.25	3.9%	69.6%	16.51	Orascom Const	77.80	-1.4%	2.5%	16.10
ELSWEDY ELECTRIC	9.04	3.9%	-8.0%	32.45	Egyptian Kuwaiti Holding-EGP	29.13	-1.3%	48.2%	2.88
Housing & Development Bank	12.74	3.5%	1.2%	6.19	Misr Fertilizers Production Co	132.19	-0.7%	35.6%	5.66
Telecom Egypt	23.38	3.1%	39.4%	73.13	Juhayna Food Industries	6.95	-0.6%	-9.2%	1.25
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£)
Alexandria Containers and goods	14.25	14.33	-0.6%	16.51	Cleopatra Hospital Company	4.50	3.81	18.1%	3.45
Commercial International Bank	37.85	38.59	-1.9%	535.11	Oriental Weavers	7.80	6.30	23.8%	12.79
Misr Fertilizers Production Co	132.19	134.90	-2.0%	5.66	Juhayna Food Industries	6.95	5.46	27.3%	1.25
Egyptian Kuwaiti Holding-EGP	29.13	29.90	-2.6%	2.88	T M G Holding	8.65	6.50	33.1%	6.06
Abou Kir Fertilizers	30.81	31.88	-3.4%	19.24	Alexandria Mineral Oils Company	4.30	3.21	34.0%	23.51

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Apollo Hospitals Enterprise Ltd	4815.00	4.6%	-4.2%	8675.077	Cipla	1097.10	-1.0%	16.2%	3225.81
HDFC Life Insurance Co. Ltd	572.00	4.5%	-11.9%	5989.71	Coal India	229.00	-0.7%	56.8%	1875.50
Bharat Petroleum	320.45	3.3%	-16.9%	2687.10	Bajaj Finserv	1632.10	-0.3%	-90.1%	2709.55
Infosys	1635.00	3.3%	-13.4%	8530.14	Kotak Mahindra Bank	1949.60	-0.2%	8.5%	2721.91
Tata Consumer products ltd.	793.20	3.0%	6.7%	4902.44	Tata Motors	423.90	-0.04%	-12.1%	2861.90
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Britannia Inds.	4204.95	4237.00	-0.76%	970.05	Wipro	398.10	372.40	6.9%	2636.28
Larsen & Toubro	2056.00	2078.55	-1.1%	3297.09	Bharat Petroleum	320.45	288.05	11.2%	2687.10
Bharti Airtel	848.95	860.55	-1.3%	2911.44	Tech Mahindra	1068.10	943.70	13.2%	2343.11
State Bank Of India	609.60	622.70	-2.1%	5454.33	HDFC Life Insurance Co. Ltd	572.00	497.05	15.1%	5989.71
Sun Pharma Industries	1035.50	1070.95	-3.3%	2049.57	Tata Consultancy Svs.	3383.00	2926.10	15.6%	4350.43

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group	31.95	5.3%	26.8%	1.02	Diamond Trust Bank Limited	46.00	-2.1%	-22.7%	0.07
Nation Media Group	16.30	1.6%	-11.7%	0.01	The Coop Bank of Kenya Ltd	12.40	-1.6%	-4.2%	0.87
Standard Chartered Bank Kenya Ltd	142.75	1.4%	11.3%	1.77	Bamburi Cement Limited	34.00	-1.4%	-10.5%	0.24
Equity Group Holdings Plc	45.45	1.0%	-13.8%	1.16	Kenya Power & Lighting Limited	1.50	-1.3%	-14.3%	0.65
Kengen Limited	3.29	0.6%	-21.5%	1.24	Centum Investment Co.	7.96	-1.0%	-43.5%	0.33
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	31.95	33.25	-3.9%	1.02	Kenya Reinsurance Corp Ltd	1.80	1.78	1.1%	0.04
Standard Chartered Bank Kenya Ltd	142.75	148.75	-4.0%	1.77	Kengen Limited	3.29	3.24	1.5%	1.24
East African Breweries Limited	166.00	174.75	-5.0%	74.73	Diamond Trust Bank Limited	46.00	45.00	2.2%	0.07
Total Kenya Ltd	25.00	26.40	-5.3%	0.00	Centum Investment Co.	7.96	7.70	3.4%	0.33
Absa Bank Kenya	11.50	12.95	-11.2%	0.37	Nairobi Securities Exchange	6.78	6.48	4.6%	0.21

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tourism Enterprise Co.	29.15	10.0%	-82.9%	4.66	Saudi Arabian Amiantit Co.	34.40	-7.2%	92.2%	11.03
Al Moammar Information Systems Co.	96.40	6.4%	-36.3%	10.63	Etihad Atheeb Telecom Co.	52.80	-6.9%	79.6%	21.18
Saudi Automotive Services Co.	31.20	3.3%	1.6%	13.91	Saudi Industrial Export Co.	34.55	-5.5%	-8.8%	19.41
Saudi Research and Marketing Group	189.60	3.0%	-3.4%	13.22	Red Sea International Co.	26.90	-5.3%	27.4%	3.03
Advanced Petrochemical Co.	41.25	1.9%	-41.4%	22.19	Raydan Food Co.	25.00	-5.1%	23.8%	3.46
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.	141.00	141.00	0.0%	12.76	Advanced Petrochemical Co.	41.25	41.25	0.0%	22.19
Nahdi Medical Co.	183.20	183.20	0.0%	41.16	Al Alamiya for Coop Insurance Co.	12.84	12.84	0.0%	0.97
Elm Co.	310.00	310.00	0.0%	32.01	Al Kathiri Holding Co.	38.90	38.90	0.0%	1.24
Saudi Tadawul Group Holding Co.	163.00	163.00	0.0%	82.96	Amana Coop Insurance Co.	9.46	9.46	0.0%	4.68
ACWA POWER Co.	141.40	141.40	0.0%	461.14	Arabian Centres 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)
Sibanye Stillwater Ltd	4550.00	3.8%	-7.3%	31134.88	Mr Price Group Ltd	17055.00	-8.1%	-14.5%	72275.54
AngloGold Ashanti Ltd	12501.00	2.8%	-2.0%	35830.13	Sasol Ltd	29500.00	-4.2%	13.9%	49898.69
Prosus NV	103865.00	2.6%	-20.7%	66913.68	Old Mutual Ltd	1120.00	-1.4%	-14.5%	6350.99
Naspers Ltd	248495.00	2.6%	0.5%	121647.50	Sanlam Ltd	5550.00	-1.3%	-6.5%	16310.94
Gold Fields Ltd	18885.00	1.4%	8.4%	17669.20	FirstRand Ltd	6637.00	-1.2%	11.4%	30273.91
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	10363.00	10461.00	-0.9%	12547.93	Mr Price Group Ltd	17055.00	16455.00	3.6%	72275.54
Investec Ltd	10194.00	10300.00	-1.0%	6970.70	SPAR Group Ltd	13560.00	12909.00	5.0%	13329.55
Shoprite Holdings Ltd	25128.00	25490.00	-1.4%	26215.51	Vodacom Group Ltd	12501.00	11562.00	8.1%	8050.79
Glencore	10968.00	11156.00	-1.7%	16411.75	MultiChoice Group	11850.00	10925.00	8.5%	5204.48
Absa Group Ltd	20586.00	21100.00	-2.4%	21800.94	Clicks Group Ltd	29351.00	26993.00	8.7%	7586.79

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Sai Gon Thuong Tin Commercial	18200.00	4.0%	-42.2%	333322.08	No Va Land Invest	21950.00	-7.0%	-75.9%	71910.40
Hoa Phat Group	14350.00	4.0%	-59.1%	446508.86	Mobile World Inv. Corp	37700.00	-6.9%	-44.2%	296420.02
Vietnam Rubber Group	14350.00	4.0%	-59.1%	446508.86	Phat Dat Real Estate Devp Corp	13850.00	-6.7%	-80.2%	4774.10
Vincom Retail	27100.00	3.6%	-10.0%	32780.16	Masan Group Corp	89000.00	-4.2%	-37.1%	92871.50
Vietnam National Petroleum Group	27500.00	3.2%	-46.8%	35909.50	Khang Dien House Trading & Investment	21000.00	-3.9%	-54.7%	80171.70
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	81200.00	84436.81	-3.8%	233945.32	No Va Land Invest	21950.00	21950.00	0.0%	71910.40
Saigon Beer Alcohol Beverage Corp.	180500.00	203000.00	-11.1%	27544.30	Phat Dat Real Estate Devp Corp	13850.00	13850.00	0.0%	4774.10
Petrovietnam Gas	105800.00	130442.43	-18.9%	50202.10	Vietjet Aviation	101200.00	96100.00	5.3%	30693.96
Bank for Inv. and Devp	38000.00	49950.00	-23.9%	67993.40	Mobile World Inv. Corp	37700.00	35250.00	7.0%	296420.02
Vietcombank	73000.00	96000.00	-24.0%	78986.00	Vinhomes	45000.00	41250.00	9.1%	53217.00

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