

Daily Market Report

28 November 2022

JSE

JSE All-Share Index inched up by 0.03% and closed at 73,151.38 points on Friday, as the financial sector recorded gains.

BRVM

BRVM Composite Index increased by 0.40% and closed at 194.46 points on Friday, with Tractafic Motors Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index surged by 2.04% to close at 47,554.34 points on Friday, as the Insurance, Industrial and Banking sectors recorded gains.

EGX

EGX 30 Index jumped by 1.80% and closed at 13,009.48 points on Sunday, as the market gained LE 14.7 billion of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index was up by 0.14% to close at 816.23 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.03%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.40%
NGX Nigerian Stock Exchange	▲	2.04%
EGX Egyptian Stock Exchange	▲	1.80%
ESG Casablanca Stock Exchange	▲	0.14%

African Markets

Nigeria: NGX 30 Index climbed by 1.92% to close at 1,714.53 points on Friday. MTNN and Lafarge Africa were the top gainers.

Egypt: EGX 30 Index jumped by 1.80% and closed at 13,009.48 points on Sunday, as the market gained LE 14.7 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index increased by 0.55% and closed at 1,652.06 points on Friday. Kenya Reinsurance Corporation Ltd and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index inched down by 0.02% and closed at 66,753.48 points on Friday, as the Industrial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 443.76
INTERBANK RATES	
OPR	12.25 ▲
Overnight	12.63 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.06% to close at 10,528.49 points on Friday, as losses in the Telecommunications, Energy and Industrials sectors pushed shares lower. MSCI UAE declined by 0.75% to close at 431.76 points.

Vietnam: VN-30 Index surged by 2.84% to close at 967.49 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam rose by 3.25% to close at 616.40 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.30% to close at 10,796.46 points on Sunday, as losses in the Consumer Durables & Apparel, Food & Beverages and Capital Goods sectors pushed shares lower. MSCI Saudi Arabia dropped by 1.24% to close at 1,499.48 points.

India: Nifty 50 Index was up by 0.15% to close at 18,512.75 points on Friday, as gains in the Media, Auto, and IT sectors led shares higher. MSCI India increased by 0.23% to close at 2,117.51 points.

News

Nigeria:

Nigerians turn to Konga for black Friday deals
Real estate, construction sectors contribute N20tn to GDP
FG urges credit institutions to support NICA

Kenya:

Maize Prices Hit Historic High of KES 6,000 Per Bag as Crisis Looms
Horticulture Earnings Drop to a 2-Year Low of KES 8.8 Billion in September
CBK Assures of Adeq Forex Reserves Despite Falling Below Minimum Target

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Abu Dhabi:

Yemen's government signs \$1B aid package with UAE-based fund
Dubai's crypto push in spotlight after \$32bn FTX collapse
Vertical farming of rare agricultural produce takes root in UAE

Saudi Arabia:

Middle East Asia-Pacific to account for 58% of global air passengers by 2040
Saudi Crown Prince allocates \$703m for the develop of Tarout Island
Trade remedies sys to boost competitiveness, says Saudi minister

Egypt:

CBE offers two types of T-bills valued at EGP 28.5 bln
Egypt's CBE launches financial inclusion strategy for 2022-25
INTERVIEW: WaffarX plans to expand in Egyptian market: kCEO

South Africa:

World's most expensive drug approved to treat hemophilia at \$3.5m a dose
Stefanutti Stocks secures R110m from Eskom for disputed work at Kusile
Interest rates are up 325bps this year; how this affects your debt

India:

Indian pharma exports rise by 4.22% to \$14.57 billion during April-Oct
Adani Enterprises to raise Rs 20k crore in country's largest FPO
RBI bars Paytm from onboarding online merchants

Vietnam:

Agricultural sector aims to raise organic fertilizer proportion to 25% in 2025
Efforts to export bird's nests to China via official channels
Vietnamese firms seek coop opportunities in US market

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,528.49	-0.1%	0.0%	1.1%	24.0%	AED/USD	3.67	0.0%	0.0%
Egypt	13,009.48	1.8%	1.8%	14.4%	9.2%	EGP/USD	24.58	0.0%	56.4%
India	18,512.75	0.2%	0.0%	2.8%	6.7%	INR/USD	81.70	0.1%	9.9%
Kenya	1,652.06	0.5%	0.0%	-1.5%	-13.2%	KES/USD	122.20	0.0%	8.0%
Nigeria	1,714.39	1.9%	0.0%	8.5%	-0.5%	NGN/USD	443.50	0.0%	7.2%
Saudi Arabia	10,796.46	-1.3%	-1.3%	-7.5%	-4.7%	SAR/USD	3.76	0.0%	0.1%
South Africa	66,753.50	-0.02%	0.0%	11.2%	-0.4%	ZAR/USD	17.12	0.6%	7.2%
Vietnam	967.49	2.8%	0.0%	-5.8%	-37.0%	VND/USD	24,770.00	-0.3%	8.7%

MSCI Emerging Markets

MSCI Frontier	467.38	1.0%	0.0%	2.1%	-29.8%	Brent Crude (\$)	83.63	-2.0%	7.5%
MSCI Frontier 100	1,083.38	0.9%	0.0%	2.3%	-29.3%	Gold (\$)	1,768.80	0.8%	-3.3%
MSCI Emerging	941.01	-0.5%	0.0%	10.9%	-23.6%	Copper (\$)	8,008.00	-0.4%	-17.6%
MSCI World (USD)	2,703.67	-0.1%	0.0%	6.1%	-16.3%	Coffee (\$)	156.37	-0.6%	-21.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Airtel Africa	1450.00	7.4%	51.8%	825.73	Nestle	963.90	-10.0%	-31.9%	666.95
MTNN	210.00	5.0%	15.4%	3296.39	International Breweries	4.30	-2.3%	-8.5%	1.72
Lafarge Africa	22.05	4.5%	-7.0%	33.18	Guaranty	20.00	-1.5%	-23.1%	107.04
Nascon	10.00	3.1%	-24.2%	3.23	Wema	3.07	-1.0%	288.6%	1.04
Flour Mills	28.10	2.9%	-0.9%	4.62	FCMB	3.25	-0.9%	9.1%	54.76
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	3.07	3.07	0.0%	1.04	Unilever	11.00	10.50	4.8%	1.23
Transcorp Hotels	6.25	6.25	0.0%	0.05	Cap	16.90	15.25	10.8%	0.82
Total	193.00	193.00	0.0%	1.15	Guaranty	20.00	18.00	11.1%	107.04
Seplat Petroleum	1050.00	1050.00	0.0%	35.16	Nascon	10.00	9.00	11.1%	3.23
P Z Cussons	9.50	9.50	0.0%	1.60	Custodian	5.35	4.55	17.6%	0.87

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Corp for Tourism & Hotels	2.99	15.0%	-0.3%	5.30	Bayanat Al PLC	3.85	-5.2%	-6.1%	31.01
Fujairah Cement Industries	0.49	7.8%	-17.1%	0.00	Gulf Cement Co.	0.52	-5.1%	-25.4%	0.05
Union Insurance Company	0.55	7.2%	-21.4%	0.00	Easy Lease Motorcycle Rental	38.50	-3.5%	32.8%	16.02
Response Plus Holding	5.88	6.9%	-39.1%	9.58	Invictus Investment Co.	4.10	-2.8%	1.7%	12.71
Abu Dhabi National Hotels Co.	3.95	4.0%	4.5%	2.91	Abu Dhabi Islamic Bank	9.31	-2.5%	35.5%	11.21
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
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 EE)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn EE)
Alexandria Mineral Oils Company	4.70	9.3%	28.4%	78.17	Credit Agricole Egypt	7.91	-1.1%	-6.1%	1.95
Ibsina Pharma	1.98	7.8%	-43.4%	44.04	GB AUTO	4.75	-0.8%	-6.9%	38.98
Alexandria Containers and goods	15.30	7.4%	82.1%	13.30	Fawry For Banking Technology And Electronic Payment	4.82	-0.8%	-30.5%	37.07
Oriental Weavers	8.35	7.1%	-3.9%	37.43	Telecom Egypt	23.25	-0.6%	38.6%	22.21
ELSWEDY ELECTRIC	9.48	4.9%	-3.6%	54.47	Orascom Const	77.50	-0.4%	2.1%	14.83
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn EE)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn EE)
Abou Kir Fertilizers	32.07	32.10	-0.1%	22.15	Cleopatra Hospital Co.	4.66	3.81	22.3%	7.67
Commercial International Bank	38.60	38.69	-0.2%	196.45	Juhayna Food Industries	6.96	5.46	27.5%	1.86
Egyptian Kuwaiti Holding	29.70	29.90	-0.7%	2.52	Oriental Weavers	8.35	6.30	32.5%	37.43
Alexandria Mineral Oils Co.	4.70	4.74	-0.8%	78.17	Cairo For Investment And Real Estate Devel	12.75	9.51	34.1%	0.10
Alexandria Containers and goods	15.30	15.50	-1.3%	13.30	T M G Holding	8.78	6.50	35.1%	17.15

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HDFC Life Insurance Co Ltd	587.90	2.7%	-9.5%	5571.054	Icici Bank	930.00	-0.9%	25.7%	9161.18
Tata Motors	434.45	2.6%	-9.9%	8083.56	Nestle India Ltd	19555.00	-0.9%	-0.8%	1129.55
Hero Motocorp	2711.45	1.4%	10.1%	1139.92	Kotak Mahindra Bank	1928.70	-0.8%	7.4%	4050.16
Coal India	231.60	1.4%	58.6%	2324.13	Titan Company	2591.25	-0.7%	2.7%	1643.69
Reliance Industries	2612.75	1.3%	10.3%	8837.32	Britannia Inds.	4165.05	-0.6%	15.5%	1017.38
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	847.50	860.55	-1.5%	2532.68	Wipro	402.20	372.40	8.0%	2730.53
Larsen & Toubro	2063.00	2095.80	-1.6%	5508.30	Bharat Petroleum	323.60	288.05	12.3%	1389.02
Britannia Inds.	4165.05	4237.00	-1.7%	1017.38	Tech Mahindra	1076.70	943.70	14.1%	2084.64
State Bank Of India	607.20	622.70	-2.5%	6089.56	Tata Consultancy Svs.	3384.00	2926.10	15.6%	5362.27
Sun Pharma Industries	1033.45	1070.95	-3.5%	2012.53	ONGC	140.50	119.85	17.2%	1371.84

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corporation Ltd	1.87	3.9%	-18.7%	0.02	Bamburi Cement Limited	33.40	-1.8%	-12.1%	0.36
NCBA Group	32.85	2.8%	30.4%	2.13	British American Tobacco Kenya	428.00	-1.2%	-3.1%	0.17
Nairobi Securities Exchange	6.94	2.4%	-7.7%	0.11	Safaricom	24.65	-0.8%	-35.0%	12.30
Diamond Trust Bank Limited	47.00	2.2%	-21.0%	0.59	Nation Media Group	16.20	-0.6%	-12.2%	0.01
Kenya Power & Lighting Limited	1.52	1.3%	-13.1%	0.13	Kengen Limited	3.27	-0.6%	-22.0%	0.69
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	32.85	33.25	-1.2%	2.13	Kengen Limited	3.27	3.24	0.9%	0.69
Standard Chartered Bank Kenya Ltd	143.00	148.75	-3.9%	0.96	Centum Investment Co.	7.98	7.70	3.6%	0.07
East African Breweries Limited	165.75	174.75	-5.2%	2.34	Diamond Trust Bank Limited	47.00	45.00	4.4%	0.59
Total Kenya Ltd	25.00	26.40	-5.3%	0.00	Kenya Reinsurance Corp Ltd	1.87	1.78	5.1%	0.02
Absa Bank Kenya	11.65	12.95	-10.0%	1.15	WPP Scangroup Plc	2.97	2.80	6.1%	0.01

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.	32.05	10.0%	-81.1%	4.80	Malath Coop Insurance Co.	11.00	-9.7%	-51.7%	7.46
Dr. Sulaiman Al Habib Medical Services Group	215.00	2.4%	33.2%	16.70	United Wire Factories Co.	24.20	-8.2%	-18.9%	12.60
Abdulmohsen Alhokair Group for Tourism and Development	21.52	2.0%	24.5%	9.92	Al Yamamah Steel Industries Co.	23.00	-8.0%	-47.0%	17.61
Saudi Arabian Amiantit Co.	35.00	1.7%	95.5%	14.95	Red Sea International Co.	25.05	-6.9%	18.6%	1.83
Saudi Automotive Services Co.	31.65	1.4%	3.1%	18.37	Nama Chemicals Co.	37.00	-6.8%	14.7%	5.65
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)
Nahdi Medical Co.	182.80	182.80	0.0%	11.56	Advanced Petrochemical Co.	41.30	41.30	0.0%	19.64
Elm Co.	308.80	308.80	0.0%	8.70	Al Alamiya for Coop Insurance Co.	12.20	12.20	0.0%	0.90
Saudi Tadawul Group Holding Co.	165.20	165.20	0.0%	35.98	Al Kathiri Holding Co.	38.25	38.25	0.0%	1.22
ACWA POWER Co.	137.80	137.80	0.0%	19.93	Amana Coop Insurance Co.	9.00	9.00	0.0%	4.29
Arabian Internet and Communications Services Co.	238.00	238.00	0.0%	14.68	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)
SPAR Group Ltd	13910.00	2.6%	-16.8%	16327.47	Sibanye Stillwater Ltd	4460.00	-2.0%	-9.2%	23703.62
Bidvest Group Ltd	4460.00	2.2%	19.5%	31693.05	Aspen Pharmacare Holdings Ltd	14500.00	-1.9%	-35.4%	8906.23
Bid Corp Ltd	34134.00	1.9%	4.6%	37251.83	Naspers Ltd	244588.00	-1.6%	-1.1%	145933.43
Exxaro Resources Ltd	22231.00	1.8%	45.4%	11517.90	AngloGold Ashanti Ltd	31750.00	-1.4%	-3.4%	32644.56
Investec Ltd	10340.00	1.4%	26.1%	6867.99	Old Mutual Ltd	1104.00	-1.4%	-15.7%	10845.45
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 Ltd	10340.00	10370.00	-0.3%	6867.99	Mr Price Group Ltd	17050.00	16455.00	3.6%	17670.74
Investec	10497.00	10540.00	-0.4%	13182.16	SPAR Group Ltd	13910.00	12909.00	7.8%	16327.47
Shoprite Holdings Ltd	25210.00	25490.00	-1.1%	12441.71	Vodacom Group Ltd	12488.00	11562.00	8.0%	8981.62
Glencore	11054.00	11207.00	-1.4%	19753.63	MultiChoice Group	11861.00	10925.00	8.6%	5346.00
Absa Group Ltd	20782.00	21100.00	-1.5%	20851.52	Clicks Group Ltd	29359.00	26993.00	8.8%	8163.62

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	22450.00	6.9%	-51.6%	111293.63	Phat Dat Real Estate Devop Corp	12900.00	-6.9%	-81.5%	59325.81
Saigon Securities Inc	17100.00	6.9%	-62.8%	385933.32	No Va Land Invest	20450.00	-6.8%	-77.5%	150409.75
Hoa Phat Group	15300.00	6.6%	-56.4%	405968.67	Petrovietnam Gas	104800.00	-0.9%	11.9%	41794.24
Vietnam Rubber Group	15300.00	6.6%	-56.4%	405968.67	Saigon Beer Alcohol Beverage Corp.	180000.00	-0.3%	21.8%	25992.00
Vingroup	65000.00	6.6%	-31.7%	148908.50					
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	82200.00	84436.81	-2.6%	213399.42	No Va Land Invest	20450.00	20450.00	0.0%	150409.75
Saigon Beer Alcohol Beverage Corp.	180000.00	203000.00	-11.3%	25992.00	Phat Dat Real Estate Devop	12900.00	12900.00	0.0%	59325.81
Petrovietnam Gas	104800.00	130442.43	-19.7%	41794.24	Vietjet Aviation	102000.00	96100.00	6.1%	28315.20
Bank for Inv. and Devp	40000.00	49950.00	-19.9%	102576.00	Mobile World Inv. Corp	37800.00	35250.00	7.2%	98102.34
Vietcombank	73100.00	96000.00	-23.9%	122449.81	Tien Phong Commercial Joint Stock Bank	20300.00	18300.00	10.9%	61618.62

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