

# Daily Market Report

## 30 November 2022

### JSE

JSE All-Share Index decreased by 0.33% and closed at 73,127.92 points on Tuesday, as the Industrial and financial sectors recorded losses.

### BRVM

BRVM Composite Index decreased by 0.37% and closed at 193.32 points on Tuesday, with Total Côte d'Ivoire and Bollore Transport & Logistics being the top losers.

### NSE

NGX All-Share Index decreased by 0.24% to close at 47,322.97 points on Tuesday, as the Industrial and Banking and Consumer Goods sectors recorded losses.

### EGX

EGX 30 Index climbed by 2.07% and closed at 13,184.26 points on Tuesday, as the market gained LE 15.3 billion of market cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index inched down by 0.09% to close at 816.15 points on Tuesday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	0.33%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.37%
<b>NGX</b> Nigerian Stock Exchange	▼	0.24%
<b>EGX</b> Egyptian Stock Exchange	▲	2.07%
<b>ESG</b> Casablanca Stock Exchange	▼	0.09%

### African Markets

**Nigeria:** NGX 30 Index decreased by 0.28% to close at 1,704.08 points on Tuesday. Nigerian Breweries and Ecobank were the top losers.

**Egypt:** EGX 30 Index climbed by 2.07% and closed at 13,184.26 points on Tuesday, as the market gained LE 15.3 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index was up by 0.10% and closed at 1,644.73 points on Tuesday. Absa Bank Kenya and Equity Group Holdings were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.27% and closed at 66,815.88 points on Tuesday, as the Industrial and financial sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 444.53
<b>INTERBANK RATES</b>	
OPR	14.75 ▲
Overnight	15.75 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index was down by 0.13% to close at 10392.30 points on Tuesday, as losses in the Real Estate, Financials, and Utilities sectors pushed shares lower. MSCI UAE inched down by 0.05% to close at 423.89 points.

**Vietnam:** VN-30 Index surged by 2.46% to close at 1,029.04 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam rose by 3.92% to close at 662.59 points.

**Saudi Arabia:** Tadawul All Share Index inched up by 0.05% to close at 10,752.01 points on Tuesday, as gains in the Energy, Retailing and Telecommunication Services sectors led shares higher. MSCI Saudi Arabia inched up by 0.05% to close at 1,492.09 points.

**India:** Nifty 50 Index increased by 0.30% to close at 18,618.05 points on Tuesday, as gains in the Bank, Pharma and FMCG sectors led shares higher. MSCI India increased by 0.38% to close at 2,132.94 points.

### News

#### Nigeria:

Banks' Consumer Loans Up 31% to N2.55trn on Rising Inflation  
Kogi, China plan N591bn investments, 685,000 jobs  
NDIC pays N113.2b to liquidated banks' depositors

#### Kenya:

Absa writes off Sh1.8bn mobile loans in CBK plan  
Kenya seeks MPs' nod on new UK defence pact  
Centum sets aside Sh600m for its share buy back plan

#### Abu Dhabi:

UAE brings forward oil production capacity expansion to 2027  
UAE President Sheikh Mohamed wipes out \$136m debt for Emirates  
Etihad Rail joins forces with Borouge for sustainable transport

#### Saudi Arabia:

Saudi Arabia offering \$6tn of investment opportunities in travel and tourism: Minister  
Saudi Kayan pays \$644m as final installment on senior loan  
Ceer EV plant to be built in Emaar EC in \$95m deal

#### Egypt:

Egyptian economy grows 4.4% in Q1 2022/23  
BMW's distributor pledges to invest \$100M in Egypt  
Egypt's food imports surge by \$502.9M in Jan.-Aug. 2022

#### South Africa:

Saldanha Bay IDZ's green hydrogen ambitions  
Energy regulator withdraws Eskom tariff decision from agenda  
Private debt an increasingly popular global asset class

#### India:

Adani Group bags Dharavi redevelopment project with a Rs 5,069 crore bid  
India's finished steel imports from Russia hit 4-year high in April-October  
RBI to pilot digital rupee for retail use from December 1

#### Vietnam:

Eleven-month CPI increases 3.02% year  
FDI exceeds 25.1 billion USD in 11 months of 2022  
Japanese-funded 35-million-USD R&D centre opens in Da Nang

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,392.30	-0.1%	-1.3%	-0.2%	22.4%	AED/USD	3.67	0.0%	0.0%
Egypt	13,184.26	2.1%	5.3%	15.9%	10.7%	EGP/USD	24.55	-0.1%	56.3%
India	18,618.05	0.3%	0.6%	3.4%	7.3%	INR/USD	81.72	0.1%	9.9%
Kenya	1,644.73	0.1%	-0.4%	-2.0%	-13.6%	KES/USD	122.45	0.0%	8.2%
Nigeria	1,704.08	-0.3%	-0.6%	7.9%	-1.1%	NGN/USD	443.00	-0.2%	7.1%
Saudi Arabia	10,752.01	0.05%	-3.5%	-7.8%	-5.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	66,815.88	-0.3%	0.1%	11.3%	-0.4%	ZAR/USD	16.98	-0.8%	6.4%
Vietnam	1,029.04	2.5%	6.4%	0.2%	-33.0%	VND/USD	24,760.00	-0.1%	8.6%

## MSCI Emerging Markets

MSCI Frontier	478.06	1.6%	2.29%	4.4%	-28.2%	Brent Crude (\$)	83.03	-0.2%	6.7%
MSCI Frontier 100	1,107.65	1.5%	2.2%	4.6%	-27.8%	Gold (\$)	1,763.70	0.5%	-3.5%
MSCI Emerging	952.94	2.4%	1.3%	12.4%	-22.7%	Copper (\$)	8,037.50	1.0%	-17.3%
MSCI World (USD)	2,663.25	-0.2%	-1.5%	4.5%	-17.6%	Coffee (\$)	155.16	-1.3%	-21.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.35	3.1%	12.4%	11.26	Nigerian Breweries	45.20	-7.7%	-5.8%	41.57
FBNH	11.20	1.8%	-2.6%	96.62	Ecobank	10.10	-5.2%	21.0%	11.24
UACN	9.55	0.5%	-0.5%	27.96	UBN	6.25	-4.6%	3.3%	27.89
Fidelity	4.12	0.5%	61.6%	14.79	Stanbic IBTC	30.55	-4.2%	-15.1%	114.21
Cadbury	11.20	0.4%	27.3%	11.76	Access	8.20	-3.5%	-9.9%	94.92
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	3.00	3.00	0.0%	2.23	Unilever	11.00	10.50	4.8%	4.24
Transcorp Hotels	6.25	6.25	0.0%	0.01	Guaranty	19.90	18.00	10.6%	169.38
Total	193.00	193.00	0.0%	1.86	Cap	16.90	15.25	10.8%	3.44
Seplat Petroleum	1050.00	1050.00	0.0%	0.19	Custodian	5.35	4.55	17.6%	0.23
P Z Cussons	9.50	9.50	0.0%	5.52	Nascon	10.70	9.00	18.9%	4.64

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Umm Al Qaiwain General Investment Co.	1.18	9.3%	2.6%	0.19	Methaq Takaful Insurance Co.	0.64	-5.8%	-21.6%	0.19
Abu Dhabi National Co. for Building Materials	0.20	5.3%	-19.7%	0.06	Bayanat Al	3.85	-5.2%	-6.1%	31.01
National Corp for Tourism & Hotels	3.15	3.3%	5.0%	1.07	Emirates Driving Co.	27.06	-4.3%	28.2%	8.05
Alpha Dhabi Holding	27.28	2.9%	-0.1%	190.94	Abu Dhabi National Energy Co	3.55	-3.5%	168.9%	43.83
Hayah Insurance Company	1.11	2.8%	70.8%	0.16	Multiply Group	4.73	-3.5%	157.1%	235.58
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 Company	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£)
Qatar National Bank Alahly	18.13	6.4%	2.4%	7.82	Juhayna Food Industries	6.70	-1.5%	-12.4%	23.04
Credit Agricole Egypt	8.27	5.5%	-1.8%	7.48	Misr Fertilizers Production Company	131.73	-0.9%	35.1%	19.84
Housing & Development Bank	13.52	4.7%	7.4%	10.38	Alexandria Mineral Oils Company	4.64	-0.9%	26.8%	23.77
Abou Kir Fertilizers	34.00	4.6%	58.1%	64.61	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.77	-0.7%	15.4%	2.77
Commercial International Bank	39.84	4.0%	13.1%	207.32	E-finance For Digital and Financial Investments	17.17	-0.7%	-15.4%	7.29
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£)
Abou Kir Fertilizers	34.00	34.00	0.0%	64.61	Cleopatra Hospital Co.	4.64	3.81	21.8%	12.47
Commercial International Bank	39.84	39.88	-0.1%	207.32	Juhayna Food Industries	6.70	5.46	22.7%	23.04
Alexandria Containers and goods	15.90	16.09	-1.2%	13.11	Oriental Weavers	8.39	6.30	33.2%	21.16
Egyptian Kuwaiti Holding	29.78	30.15	-1.2%	19.98	T M G Holding	8.70	6.50	33.8%	46.94
Sidi Kerir Petrochemicals	9.37	9.52	-1.6%	31.14	Cairo For Investment And Real Estate Devp	12.96	9.51	36.3%	0.48

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2635.95	4.4%	11.7%	6629.678	Indusind Bank	1180.00	-1.5%	32.9%	2224.45
Jsw Steel	731.10	2.2%	11.5%	2405.74	Coal India	226.55	-1.4%	55.1%	1512.48
Cipla	1122.10	1.9%	18.9%	2124.08	Bajaj Finserv	1633.00	-1.2%	-90.0%	2205.71
Hero Motocorp	2832.00	1.7%	15.0%	2062.56	Eicher Motors	3410.00	-0.9%	31.6%	1571.45
Sun Pharma Industries	1050.50	1.5%	24.2%	1231.81	Power Grid Corp Of India	219.50	-0.8%	7.4%	1066.80
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.	4275.00	4302.00	-0.6%	2557.71	Wipro	404.00	372.40	8.5%	1849.83
Sun Pharma Industries	1050.50	1070.95	-1.9%	1231.81	Tech Mahindra	1074.00	943.70	13.8%	1331.71
Larsen & Toubro	2052.50	2095.80	-2.1%	2899.90	Tata Consultancy Svs.	3390.00	2926.10	15.9%	5376.76
State Bank Of India	608.10	622.70	-2.3%	4230.46	ONGC	140.30	119.85	17.1%	1899.74
Bharti Airtel	835.50	860.55	-2.9%	2248.77	Bharat Petroleum	338.45	288.05	17.5%	1702.53

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Absa Bank Kenya	11.80	3.5%	-0.4%	1.43	Bamburi Cement Limited	29.90	-4.3%	-21.3%	0.53
Equity Group Holdings	46.95	2.8%	-11.0%	205.71	Total Kenya Ltd	24.00	-4.0%	-4.0%	0.01
Nation Media Group	16.40	2.8%	-11.1%	0.09	The Cooperative Bank of Kenya Ltd	12.10	-2.8%	-6.6%	1.47
Standard Chartered Bank Kenya Ltd	144.25	1.2%	12.5%	1.98	Kenya Power & Lighting Limited	1.50	-1.3%	-14.3%	0.81
Nairobi Securities Exchange	6.82	1.2%	-9.3%	0.07	Safaricom	24.45	-1.0%	-35.6%	68.41
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	33.00	33.50	-1.5%	1.22	Kengen Limited	3.26	3.22	1.2%	0.47
Standard Chartered Bank Kenya Ltd	144.25	148.75	-3.0%	1.98	Bamburi Cement Ltd	29.90	29.10	2.7%	0.53
East African Breweries Limited	166.25	174.75	-4.9%	194.40	Centum Investment Company	7.98	7.70	3.6%	0.99
Absa Bank Kenya	11.80	12.95	-8.9%	1.43	WPP Scangroup	2.94	2.80	5.0%	0.05
Total Kenya Ltd	24.00	26.40	-9.1%	0.01	Nairobi Securities Exchange	6.82	6.48	5.2%	0.07

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Ash-Sharqiyah Development Co.	58.50	10.0%	-38.2%	6.23	Tourism Enterprise Co.	31.75	-9.9%	-81.3%	109.00
Ethiad Atheeb Telecom Co.	57.20	5.2%	94.6%	95.26	Gulf Union Alahlia	9.41	-4.8%	-43.1%	1.65
Saudi Automotive Services Co.	34.00	4.3%	10.7%	22.61	Saudi Enaya Coop Insurance Co.	13.34	-4.3%	-57.1%	3.63
Seera Group Holding	19.00	3.9%	10.1%	30.28	Rabigh Refining and Petrochemical Co.	10.36	-3.7%	-50.0%	77.75
Ethiad Etisalat Co.	36.05	3.4%	15.7%	20.62	Middle East Paper Co.	28.00	-3.5%	-35.8%	16.33
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.	142.40	142.40	0.0%	11.78	Advanced Petrochemical Co.	41.10	41.10	0.0%	19.15
Nahdi Medical Co.	179.00	179.00	0.0%	162.50	Al Alamiya for Coop Insurance Co.	11.80	11.80	0.0%	1.48
Elm Co.	318.00	318.00	0.0%	38.89	Al Kathiri Holding Co.	38.85	38.85	0.0%	1.49
Saudi Tadawul Group Holding Co.	162.00	162.00	0.0%	70.66	Amana Coop Insurance Co.	9.10	9.10	0.0%	2.54
ACWA POWER Co.	134.40	134.40	0.0%	37.38	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)
Anglo American	67007.00	2.4%	3.9%	99124.93	FirstRand Ltd	6504.00	-2.9%	9.2%	72033.22
Glencore	12710.00	1.9%	40.5%	42955.02	Mr Price Group Ltd	16662.00	-2.8%	-16.5%	23471.74
Vodacom Group Ltd	12710.00	1.3%	-5.6%	16310.92	Bid Corp Ltd	32826.00	-2.6%	0.6%	30565.40
Exxaro Resources Ltd	22417.00	1.1%	46.6%	12472.95	AngloGold Ashanti Ltd	30220.00	-2.3%	-8.1%	33129.37
Investec Ltd	10367.00	0.6%	26.4%	5138.38	Standard Bank Group Ltd	17797.00	-2.0%	27.1%	55313.84
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	10525.00	10599.00	-0.7%	12368.04	Mr Price Group Ltd	16662.00	16455.00	1.3%	23471.74
Glencore	11177.00	11292.00	-1.0%	42955.02	SPAR Group Ltd	13700.00	12909.00	6.1%	11468.89
Investec Ltd	10367.00	10499.00	-1.3%	5138.38	Clicks Group Ltd	28927.00	26993.00	7.2%	10847.57
Shoprite Holdings Ltd	25016.00	25491.00	-1.9%	19534.99	MultiChoice Group	11900.00	10925.00	8.9%	9997.21
Absa Group Ltd	20218.00	21100.00	-4.2%	37510.11	Vodacom Group Ltd	12710.00	11562.00	9.9%	16310.92

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Khang Dien House Trading & Investment	25650.00	6.9%	-44.7%	218440.53	Saigon Beer Alcohol Beverage Corp.	176000.00	-0.6%	19.1%	54683.20
No Va Land Invest	21850.00	6.8%	-76.0%	471249.88	Viet Nam International Commercial Joint Stock Bank	18950.00	-0.5%	-45.9%	105409.38
Vingroup JSC	69400.00	6.8%	-27.0%	246994.60	Asia Commercial JS Bank	22150.00	-0.4%	-19.7%	87330.81
Phat Dat Real Estate Development Corp	12800.00	6.7%	-81.7%	1204446.72	Petrovietnam Gas	112000.00	-0.1%	19.6%	45382.40
Mobile World Inv. Corp	42800.00	6.6%	-36.6%	225496.08	]				
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)
Vinamilk	83000.00	84436.81	-1.7%	199548.60	Vietjet Aviation	102800.00	96100.00	7.0%	54504.56
Saigon Beer Alcohol Beverage Corp.	176000.00	203000.00	-13.3%	54683.20	Phat Dat Real Estate Development Corp	12800.00	11200.00	14.3%	1204446.72
Petrovietnam Gas	112000.00	130442.43	-14.1%	45382.40	No Va Land Invest	21850.00	19050.00	14.7%	471249.88
Vietcombank	79800.00	96000.00	-16.9%	136250.52	Viet Nam International Commercial Joint Stock Bank	18950.00	16200.00	17.0%	105409.38
Vincom Retail	30500.00	37000.00	-17.6%	121146.00	Tien Phong Commercial Joint Stock Bank	21500.00	18300.00	17.5%	199659.75

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