

Daily Market Report

08 December 2022

JSE

JSE All-Share Index declined by 0.73% and closed at 74,011.13 points on Wednesday, as the Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index inched down by 0.06% and closed at 192.24 points on Wednesday, with NSIA Banque CI and Servair Abidjan being the top losers.

NSE

NGX All-Share Index was up by 0.12% to close at 48426.49 points on Wednesday, as the Banking sector recorded gains.

EGX

EGX 30 Index climbed by 1.99% and closed at 14,787.05 points on Wednesday, as the market gained LE 14.30 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index was up by 0.13% to close at 842.84 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.73%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.06%
NGX Nigerian Stock Exchange	▲	0.12%
EGX Egyptian Stock Exchange	▲	1.99%
ESG Casablanca Stock Exchange	▲	0.13%

African Markets

Nigeria: NGX 30 Index inched up by 0.08% to close at 1,749.57 points on Wednesday. Nigerian Breweries and FCMB were the top gainers.

Egypt: EGX 30 Index climbed by 1.99% and closed at 14,787.05 points on Wednesday, as the market gained LE 14.30 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index was up by 0.08% and closed at 1,640.54 points on Wednesday. NCBA Group and Total Kenya Ltd were the top gainers.

South Africa: JSE Top 40 Index declined by 0.81% and closed at 67,863.44 points on Wednesday, as the Industrial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 445.47
INTERBANK RATES	
OPR	10.00 ▼
Overnight	10.38 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.69% to close at 10,336.34 points on Wednesday, as losses in the Real Estate, Health Care and Financials sectors pushed shares lower. MSCI UAE dropped by 1.22% to close at 423.66 points.

Vietnam: VN-30 Index decreased by 0.61% to close at 1,047.58 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam was up by 0.16% to close at 672.56 points.

Saudi Arabia: Tadawul All Share Index fell by 2.48% to close at 10,185.14 points on Wednesday, as losses in the Materials, Banks, and Utility sectors pushed shares lower. MSCI Saudi Arabia fell by 2.99% to close at 1,401.12 points.

India: Nifty 50 Index decreased by 0.44% to close at 18,560.50 points on Wednesday, as losses in the Bank, Auto, and Financial Services sectors pushed shares lower. MSCI India decreased by 0.42% to close at 2,133.20 points.

News

Nigeria:

MRS provided \$300m to NNPC for Chevron assets
AfCFTA eyes \$12bn trade in four years
Nigeria, other IDA countries to service \$9tr debts with \$62b

Kenya:

Kenya eyes duty-free deal with 3 countries
CBK raises Sh24bn from December bond auctions
World Bank targets to pump Sh306bn in Kenyan projects

Abu Dhabi:

Global trade surges 19% in first 9 months of 2022
e& hikes stake in Vodafone Group to 11%
Dh1.85 billion contracts signed over 2 days at ADIFE

Saudi Arabia:

Saudi Arabia exceeds surplus estimate and revises up GDP forecast
Metaverse to contribute \$7.6bn to Saudi economy by 2030: report
Saudi Ajex expands its logistics services to China and Middle East

Egypt:

Egypt inks 7 MoUs for green hydrogen projects with global, local consortia
Egypt's annual inflation expected to rise to 18.75% in November
Egypt issues USD 500 mn Estidama bonds in 6 months

South Africa:

AfDB mobilizes \$8.9b for Africa's low-income countries
Eskom extends Stage 6 load shedding till Friday
Markus Jooste penalised R20m by the FSCA

India:

RBI raises repo rate by 35 basis points to 6.25%
RBI cuts FY23 GDP growth forecast to 6.8% from 7%
TCS wins £250 million deal from BT Group

Vietnam:

Index of industrial production up 8.6%
G7 makes new US\$15bil offer to Vietnam to cut coal use
Binh Duong attracts more than 3 billion USD in FDI this year

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,336.34	-0.7%	-2.0%	-2.0%	21.8%	AED/USD	3.67	0.0%	0.0%
Egypt	14,787.05	2.0%	8.4%	11.5%	24.2%	EGP/USD	24.64	0.2%	56.8%
India	18,560.50	-0.4%	-0.7%	-1.1%	7.0%	INR/USD	82.25	-0.1%	10.6%
Kenya	1,640.54	0.1%	-0.6%	0.2%	-13.8%	KES/USD	122.80	0.0%	8.5%
Nigeria	1,749.57	0.1%	0.8%	1.8%	1.6%	NGN/USD	444.81	0.0%	7.5%
Saudi Arabia	10,185.14	-2.5%	-5.9%	-6.5%	-10.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	67,863.45	-0.8%	-0.5%	-1.0%	1.2%	ZAR/USD	17.17	-0.9%	7.6%
Vietnam	1,047.58	-0.6%	-4.2%	-0.2%	-31.8%	VND/USD	23,925.00	-0.3%	5.0%

MSCI Emerging Markets

MSCI Frontier	490.29	0.2%	-0.03%	2.1%	-26.3%	Brent Crude (\$)	77.17	-2.7%	-0.8%
MSCI Frontier 100	1,135.88	0.1%	-0.2%	2.0%	-25.9%	Gold (\$)	1,798.00	0.9%	-1.7%
MSCI Emerging	958.77	-1.5%	-1.5%	-1.4%	-22.2%	Copper (\$)	8,456.50	0.4%	-13.0%
MSCI World (USD)	2,654.34	-0.3%	-2.9%	-2.4%	-17.9%	Coffee (\$)	154.49	-0.1%	-22.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	38.50	4.6%	-19.8%	52.45	Flour Mills	27.60	-1.8%	-2.6%	3.22
FCMB	3.40	4.6%	14.1%	5.59	Transnational Corporation	1.17	-1.7%	18.2%	3.63
Fidelity	4.17	1.7%	63.5%	5.99	Sterling	1.37	-1.4%	-8.7%	9.69
Nestle	980.00	1.7%	-30.7%	372.26	International Breweries	4.35	-1.1%	-7.4%	3.08
					UBA	7.25	-0.7%	-9.4%	50.46
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	3.22	3.22	0.0%	0.38	Transcorp Hotels	0.00	0.00	0.0%	0.00
UACN	10.50	10.50	0.0%	1.46	Cap	16.90	15.25	10.8%	0.05
Total	193.00	193.00	0.0%	8.58	Unilever	11.80	10.50	12.4%	0.26
Seplat Petroleum	1050.00	1050.00	0.0%	2.06	Nascon	10.45	9.00	16.1%	0.12
P Z Cussons	10.90	10.90	0.0%	3.37	Guaranty	21.00	18.00	16.7%	89.22

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
FOODCO NATIONAL FOODSTUFF	1.75	12.9%	62.0%	0.01	Gulf Cement Co.	0.52	-5.5%	-25.7%	0.03
Waha Capital Company	1.40	4.5%	16.7%	17.78	Bayanat AI PLC	3.85	-5.2%	-6.1%	31.01
PALMS SPORTS	10.30	4.0%	-15.7%	7.18	Abu Dhabi Aviation Co.	6.19	-4.3%	26.3%	0.83
Sudatel Telecommunications Group Company Limited	0.38	3.0%	8.9%	0.19	Hayah Insurance Company	1.10	-3.5%	69.2%	0.07
Easy Lease Motorcycle Rental	40.50	1.3%	39.7%	15.91	APEX INVESTMENT	3.60	-3.0%	-46.3%	5.88
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	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£)
E-finance For Digital and Financial Investments	17.95	6.8%	-11.5%	173.91	Egyptian Financial Group-HermesHolding Co.	34.59	-2.4%	133.6%	50.97
Telecom Egypt	24.59	6.1%	171.1%	24.40	Ezz Steel	5.23	-1.7%	-65.1%	160.31
Palm Hills Development Co.	1.63	5.9%	-81.3%	161.90	Heliopolis Housing	16.77	-1.4%	149.9%	5.42
Credit Agricole Egypt	13.88	4.6%	64.8%	41.69	Misr Fertilizers Production Company Fawry For Banking Technology And Electronic Payment	83.70	-0.3%	-14.1%	35.73
Egyptian Kuwaiti Holding	11.83	4.5%	-39.8%	68.93		5.00	-0.2%	47.5%	98.80
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£)
Telecom Egypt	24.59	24.59	0.0%	24.40	Commercial International Bank	8.66	8.66	0.0%	15.17
Sidi Kerir Petrochemicals	11.25	11.25	0.0%	11.15	Egyptian Kuwaiti Holding	11.83	11.83	0.0%	68.93
Medinet Nasr Housing	141.18	141.18	0.0%	19.33	Ezz Steel	5.23	5.23	0.0%	160.31
Ibnsina Pharma	7.23	7.23	0.0%	68.82	Housing & Development Bank	2.16	2.16	0.0%	44.22
Heliopolis Housing	16.77	16.77	0.0%	5.42	Juhayna Food Industries	3.39	3.39	0.0%	145.85

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2707.00	2.0%	14.7%	6377.801	SBI Life Insurance	1259.00	-2.0%	5.3%	812.24
Bharat Petroleum	335.00	2.0%	-13.1%	2397.32	NTPC	171.70	-2.0%	38.0%	1331.79
Asian Paints	3222.10	1.9%	-4.8%	5874.08	Bajaj Finserv	1606.00	-1.8%	-90.2%	3820.71
Larsen & Toubro	2125.00	1.5%	12.1%	7308.58	Tata Motors	419.90	-1.7%	-13.0%	5115.53
Axis Bank	913.00	0.9%	34.6%	8288.61	Bajaj Auto	3635.05	-1.6%	11.9%	610.12
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Axis Bank	913.00	919.95	-0.8%	8288.61	Wipro	405.50	372.40	8.9%	1337.76
Larsen & Toubro	2125.00	2144.00	-0.9%	7308.58	Tech Mahindra	1077.00	943.70	14.1%	1596.86
HUL	2707.00	2734.00	-1.0%	6377.80	Tata Motors	419.90	366.20	14.7%	5115.53
Britannia Inds.	4387.15	4451.65	-1.4%	1111.15	Tata Consultancy Svs.	3370.00	2926.10	15.2%	3938.61
State Bank Of India	606.95	622.70	-2.5%	4628.87	Bharat Petroleum	335.00	288.05	16.3%	2397.32

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group	35.00	6.1%	38.9%	13.74	WPP Scangroup	3.04	-3.2%	-26.6%	0.05
Total Kenya Ltd	23.65	2.8%	-5.4%	0.01	Centum Investment Company	8.00	-1.7%	-43.3%	1.05
Safaricom Plc	24.10	1.9%	-36.5%	86.66	Kenya Power & Lighting Limited	1.48	-0.7%	-15.4%	0.58
East African Breweries Limited	165.00	1.2%	0.0%	3.51	Absa Bank Kenya	11.95	-0.4%	0.8%	0.50
British American Tobacco Kenya Ltd	440.00	1.1%	-0.3%	81.44	Nation Media Group	15.90	-0.3%	-13.8%	0.07
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	35.00	35.00	0.0%	13.74	Kengen Limited	3.21	3.10	3.5%	0.66
Standard Chartered Bank Kenya Ltd	146.00	148.75	-1.8%	2.44	Centum Investment Company	8.00	7.70	3.9%	1.05
East African Breweries Limited	165.00	174.75	-5.6%	3.51	Safaricom	24.10	23.00	4.8%	86.66
Absa Bank Kenya	11.95	12.95	-7.7%	0.50	Nairobi Securities Exchange	6.80	6.48	4.9%	0.14
Total Kenya Ltd	23.65	26.40	-10.4%	0.01	Kenya Reinsurance Corporation Ltd	1.81	1.71	5.8%	0.04

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Buruj Coop Insurance Co.	16.66	9.6%	-24.6%	3.66	Tourism Enterprise Co.	22.90	-5.4%	-86.5%	23.59
Salama Coop Insurance Co.	13.70	4.0%	-19.4%	1.95	Gulf General Coop Insurance Co.	6.85	-5.1%	-45.8%	12.82
Saudi Printing and Packaging Co.	19.40	2.0%	-11.7%	5.65	Al Rajhi Bank	74.00	-4.9%	-47.8%	372.07
Al-Rajhi Company for Coop Insurance	83.20	1.8%	7.1%	13.36	Riyad Bank	30.40	-4.7%	12.2%	44.46
Qassim Cement Co.	61.60	1.8%	-18.6%	3.40	Al Alamiya for Coop Insurance Co.	11.12	-4.6%	-51.3%	2.29
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.	174.00	174.00	0.0%	20.24	Advanced Petrochemical Co.	40.60	40.60	0.0%	8.67
Elm Co.	330.80	330.80	0.0%	26.44	Al Alamiya for Coop Insurance Co.	11.12	11.12	0.0%	2.29
Saudi Tadawul Group Holding Co.	157.40	157.40	0.0%	64.06	Al Kathiri Holding Co.	37.30	37.30	0.0%	1.35
ACWA POWER Co.	131.80	131.80	0.0%	24.90	Amana Coop Insurance Co.	8.61	8.61	0.0%	3.71
Arabian Internet and Communications Services Co.	238.80	238.80	0.0%	32.18	Anaam International Holding Group	21.14	21.14	0.0%	10.68

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Woolworths Holdings Ltd	6962.00	7.1%	34.2%	84309.82	Investec PLC	9905.00	-4.3%	22.1%	9797.43
Vodacom Group Ltd	13181.00	4.6%	-2.1%	35984.13	Investec Ltd	9791.00	-4.2%	19.4%	5213.12
MTN Group	13564.00	2.0%	-20.5%	49101.68	Sanlam Ltd	5141.00	-3.1%	-13.4%	24419.75
Impala Platinum Holdings Ltd	20924.00	1.3%	-7.0%	46869.76	Sasol Ltd	26984.00	-2.9%	4.2%	70967.92
Mondi PLC	31093.00	0.6%	-21.3%	15682.38	Aspen Pharmacare Holdings Ltd	14127.00	-2.1%	-37.1%	13326.14
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)
British American Tobacco	71459.00	74444.00	-4.0%	37743.21	Mr Price Group Ltd	16745.00	16056.00	4.3%	24256.66
Bidvest Group Ltd	22447.00	23636.00	-5.0%	23569.35	SPAR Group Ltd	13687.00	12909.00	6.0%	30197.31
Glencore	11399.00	12259.00	-7.0%	71166.56	Clicks Group Ltd	28800.00	26993.00	6.7%	11659.10
Investec Ltd	9791.00	10536.00	-7.1%	5213.12	Aspen Pharmacare Holdings Ltd	14127.00	12889.00	9.6%	13326.14
Investec	9905.00	10734.00	-7.7%	9797.43	Vodacom Group Ltd	13181.00	11562.00	14.0%	35984.13

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vingroup JSC	71200.00	6.9%	-25.1%	665.325,47	No Va Land Invest	19200.00	-6.8%	-78.9%	446.365,87
Phat Dat Real Estate Development Corp	15800.00	1.9%	-83.4%	375.959,91	Vietnam Prosperity	16200.00	-4.1%	-54.7%	430.199,27
Vietnam JSC Bank	27350.00	1.3%	-19.3%	111.807,53	Vietnam Rubber Group JSC	14000.00	-3.8%	-62.1%	28.342,24
Khang Dien House Trading & Investment	29900.00	1.2%	-41.4%	98.885,24	Vietnam National Petroleum Group	29200.00	-3.3%	-45.8%	21.447,90
Mobile World Inv. Corp	44850.00	1.1%	-67.0%	129.803,85	Ho Chi Minh City Devp	15900.00	-3.1%	-48.5%	25.271,30
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	82500.00	87004.15	-5.2%	152.865,05	Vietnam Rubber Group	14000.00	14000.00	0.0%	28.342,24
Saigon Beer Alcohol Beverage Corp.	179000.00	197900.00	-9.6%	38.211,10	Ho Chi Minh City Devp	15900.00	15900.00	0.0%	25.271,30
Petrovietnam Gas	106800.00	130442.43	-18.1%	36.747,29	Mobile World Inv. Corp	44850.00	44850.00	0.0%	129.803,85
Vietcombank	78500.00	96000.00	-18.2%	115.936,94	No Va Land Invest	19200.00	19200.00	0.0%	446.365,87
Vincom Retail	29500.00	37000.00	-20.3%	65.579,32	Phat Dat Real Estate Development Corp	15800.00	15800.00	0.0%	375.959,91

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