

Daily Market Report

14 December 2022

JSE

JSE All-Share Index surged by 1.90% and closed at 75,835.44 points on Tuesday, as the Financial and Resources sector recorded gains.

BRVM

BRVM Composite Index increased by 0.33% and closed at 197.01 points on Tuesday, with Uniwax Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NGX All-Share Index inched down by 0.09% to close at 48,853.54 points on Tuesday, as the market witnessed a slowdown in the recent rally due to profit booking by short-term investors.

EGX

EGX 30 Index surged by 2.90% and closed at 15150.31 points on Tuesday, as the market gained LE 26.11 billion of market cap, amid Arab buying.

ESG

Casablanca ESG 10 Index inched up by 0.01% to close at 846.42 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	1.90%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.33%
NGX Nigerian Stock Exchange	▼	0.09%
EGX Egyptian Stock Exchange	▲	2.90%
ESG Casablanca Stock Exchange	▲	0.01%

African Markets

Nigeria: NGX 30 Index was down by 0.12% to close at 1,766.44 points on Tuesday. MTNN and UBN were the top losers.

Egypt: EGX 30 Index surged by 2.90% and closed at 15150.31 points on Tuesday, as the market gained LE 26.11 billion of market cap, amid Arab buying.

Kenya: NSE 20 Index decreased by 0.26% and closed at 1,642.12 points on Tuesday. Nation Media Group and Kenya Reinsurance Corporation Ltd were the top losers.

South Africa: JSE Top 40 Index surged by 2.05% and closed at 69,675.69 points on Tuesday, as the Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 445.96
INTERBANK RATES	
OPR	14.38 ▼
Overnight	15.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index declined by 1.04% to close at 10,049.74 points on Tuesday, as losses in the Utilities, Real Estate, and Financials sectors pushed shares lower. MSCI UAE dropped by 1.57% to close at 404.84 points.

Vietnam: VN-30 Index climbed by 1.83% to close at 1,056.43 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam jumped by 1.40% to close at 655.74 points.

Saudi Arabia: Tadawul All Share Index climbed by 1.87% to close at 10,221.14 points on Tuesday, as gains in the Banks, Software & Services, and Diversified Financials sectors led shares higher. MSCI Saudi Arabia climbed by 1.79% to close at 1,421.38 points.

India: Nifty 50 Index increased by 0.60% to close at 18,608.00 points on Tuesday, as gains in the Bank, Auto, and Financial Services sectors led shares higher. MSCI India increased by 0.48% to close at 2,130.63 points.

News

Nigeria:

Senate passes NCC's N559bn budget
Shareholders Approve Dangote Cement's Share Buy-Back
PenCom Announces 34 Mortgage Banks for RSA Mortgage Financing

Kenya:

Kenya & South Sudan Sign Cargo Deal after Lifting Agree Barriers
Banks Set to Raise Interest Rates in Jan to Reflect Revised Lending Rates
Unga Group Considers Exiting the Grain Milling Business

Abu Dhabi:

Sudan, Emirati group to develop \$6bn Red Sea port
UAE President opens Dhs4 billion South Quay project at Khalifa Port
Abu Dhabi's \$1.1bn Khalifa Port expansion unveiled

Saudi Arabia:

PIF zeroes in on local content growth to boost Saudi economy
Luberef IPO: Saudi Aramco's refining unit set to raise \$1.32bn from offering
Saudi developer ROSHN acquires Riyadh Front to expand its footprint

Egypt:

Egypt seeks to boost foreign exchange reserves in short, medium terms
Egypt to direct 100K MW of renewable energy to produce green hydrogen in 10 yrs
Telecom Egypt Signs Agreement to Establish Maritime System Linking Greece

South Africa:

SA business confidence index rises in November – SACCI
Agriculture exports rake in R65bn in third quarter, up 10%
Retail confidence in SA has dropped from 51% to 42% in 4Q

India:

Govt repays IL&FS loans with sovereign guarantee
Paytm announces Rs 850 crore buyback at max price of Rs 810
Bank of America expects \$10 billion in India green deals in 2023

Vietnam:

Việt Nam eyes double investment in agriculture to \$34 billion by 2030
Quang Ninh's FDI attraction surpasses 2-bn-USD mark
Banks strengthen provision buffer for default loans amid rising bad debts

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,049.74	-1.0%	-2.0%	-4.8%	18.4%	AED/USD	3.67	0.0%	0.0%
Egypt	15,150.31	2.9%	2.1%	14.3%	27.2%	EGP/USD	24.66	0.0%	57.0%
India	18,608.00	0.6%	0.6%	-0.8%	7.2%	INR/USD	82.40	-0.3%	10.8%
Kenya	1,642.12	-0.3%	-0.3%	0.3%	-13.7%	KES/USD	122.95	0.2%	8.7%
Nigeria	1,766.44	-0.1%	-0.1%	2.8%	2.6%	NGN/USD	445.31	0.0%	7.6%
Saudi Arabia	10,221.14	1.9%	-0.2%	-6.2%	-9.8%	SAR/USD	3.76	0.0%	0.1%
South Africa	69,675.69	2.0%	1.9%	1.6%	3.9%	ZAR/USD	17.25	-1.9%	8.1%
Vietnam	1,056.43	1.8%	-0.8%	0.7%	-31.2%	VND/USD	23,625.00	-0.3%	3.7%

MSCI Emerging Markets

MSCI Frontier	490.49	0.7%	-0.04%	2.2%	-26.3%	Brent Crude (\$)	80.68	3.4%	3.7%
MSCI Frontier 100	1,137.81	0.9%	-0.04%	2.2%	-25.8%	Gold (\$)	1,825.50	1.9%	-0.2%
MSCI Emerging	965.25	0.2%	-1.3%	-0.7%	-21.7%	Copper (\$)	8,497.00	1.5%	-12.6%
MSCI World (USD)	2,715.49	1.2%	2.0%	-0.2%	-16.0%	Coffee (\$)	152.11	3.7%	-20.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
BUA Cement	95.00	3.6%	41.7%	69.37	Cap	16.20	-4.1%	-16.7%	7.46
Zenith	23.00	2.4%	-8.0%	323.62	Axamansard	1.83	-3.7%	-17.9%	1.29
United Capital	13.50	1.9%	36.4%	15.87	MTNN	208.00	-3.3%	14.3%	2596.03
Wema	3.30	1.2%	317.7%	5.07	UBN	6.35	-2.3%	5.0%	15.37
UBA	7.35	0.7%	-8.1%	22.29	Stanbic IBTC	29.45	-1.8%	-18.2%	18.91
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	3.30	3.30	0.0%	5.07	Transcorp Hotels	0.00	0.00	0.0%	0.00
UACN	10.50	10.50	0.0%	1.28	Cap	16.20	15.25	6.2%	7.46
Total	193.00	193.00	0.0%	6.77	Unilever	11.80	10.50	12.4%	0.78
Seplat Petroleum	1050.00	1050.00	0.0%	1.30	Nascon	10.45	9.00	16.1%	0.12
P Z Cussons	11.30	11.30	0.0%	0.41	Guaranty	21.00	18.00	16.7%	403.29

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Commercial Bank International	0.83	14.9%	36.8%	0.00	Aram Group	1.98	-10.0%	-36.1%	0.09
FOODCO NATIONAL FOODSTUFF	2.70	12.5%	150.0%	0.01	Q Holding	3.74	-9.2%	-15.2%	29.64
Fujairah Cement Industries	0.48	10.4%	-18.5%	0.00	RAK Co. for White Cement & Const Materials	1.61	-9.0%	-5.3%	0.00
Gulf Cement Co.	0.54	8.0%	-22.9%	0.10	Sudatel Telecom Group Co. Limited	0.46	-8.2%	32.0%	3.81
Gulf Pharmaceutical Industries	1.17	1.7%	-36.4%	0.02	Easy Lease Motorcycle Rental	32.60	-7.9%	12.4%	12.14
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)
International Holding Company	410.00	410.00	0.0%	215.44	Gulf Medical Projects Company	1.64	1.64	0.0%	0.00
Al Wathba National Insurance Co.	5.50	5.50	0.0%	0.00	ADNOC Drilling Company PJSC	2.95	2.95	0.0%	34.86
Al Buhaira National Insurance Co.	2.45	2.45	0.0%	0.00	DANA GAS	0.89	0.89	0.0%	5.91
Al Fujairah National Insurance Co.	224.00	224.00	0.0%	0.00	Aram Group	1.98	1.98	0.0%	0.09
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING	4.07	4.07	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£)
Orascom Construction	10.60	17.0%	54.1%	68.72	Cleopatra Hospital Co.	45.15	-0.6%	817.7%	367.68
Palm Hills Development Co.	2.13	15.8%	-75.5%	266.34					
Juhayna Food Industries	3.70	10.5%	-51.6%	187.44					
GB AUTO	7.97	10.1%	56.3%	94.78					
ELSWEDY ELECTRIC	21.30	9.1%	116.7%	88.86					
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	23.22	23.22	0.0%	20.20	Commercial International Ban	8.94	8.94	0.0%	12.08
T M G Holding	10.10	10.10	0.0%	9.40	Egyptian Kuwaiti Holding	12.46	12.46	0.0%	51.39
Sidi Kerir Petrochemicals	14.06	14.06	0.0%	13.81	Ezz Steel	5.46	5.46	0.0%	292.66
Palm Hills Development Co.	2.13	2.13	0.0%	266.34	Housing & Development Bank	2.30	2.30	0.0%	36.97
Medinet Nasr Housing	143.55	143.55	0.0%	11.66	Juhayna Food Industries	3.70	3.70	0.0%	187.44

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	1232.50	2.1%	38.8%	5100.523	Apollo Hospitals Enterprise Ltd	4682.00	-1.3%	-6.8%	1707.67
Bajaj Finance	6640.00	2.1%	-4.8%	6324.28	UPL	765.00	-1.0%	2.4%	1165.90
Infosys	1571.00	1.5%	-16.8%	9592.24	Hindalco Industries	457.80	-0.9%	-3.7%	2005.27
Hcl Technologies	1044.10	1.5%	-20.8%	2378.82	Nestle India Limited	20345.00	-0.7%	3.2%	1005.43
Tata Consultancy Svs.	3335.00	1.5%	-10.8%	4562.35	Bharat Petroleum	346.70	-0.7%	-10.1%	1343.09
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	943.80	949.30	-0.6%	7690.51	Wipro	397.80	372.40	6.8%	1354.52
Britannia Inds.	4410.00	4452.00	-0.9%	699.79	Tech Mahindra	1045.15	943.70	10.8%	2063.95
State Bank Of India	616.80	622.70	-0.9%	4588.36	Tata Consultancy Svs.	3335.00	2926.10	14.0%	4562.35
HUL	2709.40	2741.60	-1.2%	3431.78	Tata Motors	418.50	366.20	14.3%	4071.41
Larsen & Toubro	2168.00	2194.35	-1.2%	2668.18	Kotak Mahindra Bank	1868.70	1631.00	14.6%	12942.77

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Equity Group Holdings Plc	46.90	4.2%	-11.1%	8.85	Nation Media Group	15.15	-4.4%	-17.9%	0.06
Safaricom Plc	24.75	2.7%	-34.8%	21.69	Kenya Reinsurance Corporation Ltd	1.82	-3.7%	-20.9%	0.34
WPP Scangroup Plc	3.20	0.9%	-22.7%	0.03	Standard Chartered Bank Kenya Ltd	142.25	-2.6%	10.9%	0.16
Kengen Limited	3.25	0.6%	-22.4%	0.41	NCBA Group	34.45	-1.9%	36.7%	0.05
Nairobi Securities Exchange Plc	6.82	0.3%	-9.3%	0.01	Centum Investment Company	8.04	-1.7%	-43.0%	0.02
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 Plc	34.45	33.50	2.8%	0.05	Nation Media Group	15.15	15.00	1.0%	0.06
Standard Chartered Bank Kenya Ltd	142.25	148.75	-4.4%	0.16	Centum Investment Co.	8.04	7.70	4.4%	0.02
Total Kenya Ltd	25.10	26.40	-4.9%	0.00	Kengen Limited	3.25	3.10	4.8%	0.41
East African Breweries Limited	165.75	174.75	-5.2%	107.72	Nairobi Securities Exchange Plc	6.82	6.48	5.2%	0.01
Absa Bank Kenya	12.00	12.95	-7.3%	1.03	Kenya Reinsurance Corporation Ltd	1.82	1.71	6.4%	0.34

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tanmiah Food Co.	113.60	9.9%	38.4%	21.25	Abdullah Al Othaim Markets Co.	103.00	-3.9%	-4.8%	25.78
Nama Chemicals Co.	33.85	8.3%	5.0%	12.28	Gulf Union Alahlia	8.43	-3.1%	-49.0%	0.75
Tabuk Cement Co.	15.20	8.1%	-12.9%	1.58	Saudi Arabian Mining Co.	67.00	-2.8%	-14.6%	275.91
Buruj Cooperative Insurance Co.	16.28	7.8%	-26.3%	3.37	Saudi Arabian Mining Co.	67.00	-2.8%	70.1%	275.91
Alinma Bank	32.35	5.9%	35.0%	174.16	Bonyan REIT Fund	9.58	-2.6%	-1.8%	1.68
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.	168.00	168.00	0.0%	113.22	Advanced Petrochemical Co.	40.20	40.20	0.0%	15.04
Elm Co.	325.20	325.20	0.0%	43.33	Al Alamiya for Coop Insurance Co.	11.24	11.24	0.0%	1.06
Saudi Tadawul Group Holding Co.	160.00	160.00	0.0%	66.85	Al Kathiri Holding Co.	35.90	35.90	0.0%	2.03
ACWA POWER Co.	143.00	143.00	0.0%	66.75	Allied Coop Insurance Group	11.14	11.14	0.0%	1.13
Theeb Rent a Car Co	67.10	67.10	0.0%	3.80	Amana Coop Insurance Co.	8.20	8.20	0.0%	2.34

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
AngloGold Ashanti Ltd	33664.00	51.7%	2.4%	46119.68	Exxaro Resources Ltd	21722.00	-1.9%	42.1%	15281.64
Naspers Ltd	289503.00	3.7%	17.1%	181975.80	British American Tobacco PLC	71805.00	-1.6%	22.6%	28964.70
Impala Platinum Holdings Ltd	21400.00	3.2%	-4.9%	46866.00	Standard Bank Group Ltd	16855.00	-0.5%	20.4%	66914.35
Old Mutual Ltd	1030.00	2.5%	-21.4%	12339.40	Reinet Investments SCA	33150.00	-0.3%	15.9%	6687.68
Mondi PLC	31960.00	1.8%	-19.1%	48259.60	Absa Group Ltd	19442.00	-0.1%	27.4%	33440.24
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)
Glencore	11843.00	12259.00	-3.4%	25346.99	Mr Price Group Ltd	16056.00	15808.00	1.6%	16760.47
British American Tobacco	71805.00	74444.00	-3.5%	28964.70	SPAR Group Ltd	13210.00	12909.00	2.3%	16064.27
Investec Ltd	10101.00	10536.00	-4.1%	6007.67	Clicks Group Ltd	28993.00	26993.00	7.4%	14649.24
Investec	10268.00	10734.00	-4.3%	19611.88	Aspen Pharmicare Holdings Ltd	14174.00	12889.00	10.0%	13521.00
The Bidvest Group Ltd	22271.00	23636.00	-5.8%	14723.58	Vodacom Group Ltd	12983.00	11562.00	12.3%	18565.69

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Securities Inc	20400.00	6.5%	-60.6%	492.149,36	Vingroup JSC	61600.00	-2.4%	-35.2%	177.372,84
Techcombank	28800.00	5.9%	-42.4%	201.508,60	Vinamilk	78000.00	-0.6%	-9.7%	281.530,02
Sai Gon Thuong Tin Commercial	22550.00	5.9%	-28.4%	569.089,40	Khang Dien House Trading & Investment	27900.00	-0.2%	-45.3%	63.273,29
Vinhomes	53000.00	5.0%	-35.4%	216.286,98	Saigon Beer Alcohol Beverage Corp.	178000.00	-0.2%	17.9%	64.593,68
Vincom Retail	28000.00	3.5%	-7.0%	60.037,01					
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)
Saigon Beer Alcohol Beverage Corp.	178000.00	197900.00	-10.1%	64.593,68	Vietnam Rubber Group	15000.00	15000.00	0.0%	33.769,22
Vinamilk	78000.00	87004.15	-10.3%	281.530,02	Mobile World Inv. Corp	46400.00	46400.00	0.0%	88.710,56
Vietcombank	78200.00	96000.00	-18.5%	175.509,56	No Va Land Invest	18200.00	18200.00	0.0%	1.005.984,78
Petrovietnam Gas	105600.00	130442.43	-19.0%	42.583,56	Phat Dat Real Estate Development Corp	15500.00	15500.00	0.0%	242.860,88
Asia Commercial JS Bank	23050.00	29080.00	-20.7%	60.961,85	Vietnam National Petroleum Group	31400.00	31300.00	0.3%	28.000,73

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