

# Daily Market Report

## 15 December 2022

### JSE

JSE All-Share Index fell by 2.03% and closed at 74,294.69 points on Wednesday, as the Industrial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index was down by 0.13% and closed at 196.76 points on Wednesday, with Servair Abidjan Côte d'Ivoire and Setao Côte d'Ivoire being the top losers.

### NSE

NGX All-Share Index increased by 0.28% to close at 48,988.04 points on Wednesday, as the Industrials sector recorded gains.

### EGX

EGX 30 Index climbed by 1.50% and closed at 15,378.28 points on Wednesday, as the market gained LE 13.7 billion of market cap, amid Arab buying.

### ESG

Casablanca ESG 10 Index inched down by 0.06% to close at 845.89 points on Wednesday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	2.03%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼	0.13%
<b>NGX</b> Nigerian Stock Exchange	▲	0.28%
<b>EGX</b> Egyptian Stock Exchange	▲	1.50%
<b>ESG</b> Casablanca Stock Exchange	▼	0.06%

### African Markets

**Nigeria:** NGX 30 Index increased by 0.33% to close at 1,772.28 points on Wednesday. Nascon and BUA Cement were the top gainers.

**Egypt:** EGX 30 Index climbed by 1.50% and closed at 15,378.28 points on Wednesday, as the market gained LE 13.7 billion of market cap, amid Arab buying.

**Kenya:** NSE 20 Index was up by 0.14% and closed at 1,644.37 points on Wednesday. Nation Media Group and Standard Chartered Bank Kenya Ltd were the top gainers.

**South Africa:** JSE Top 40 Index fell by 2.15% and closed at 68,179.52 points on Wednesday, as the Industrial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	21.09%
Exchange Rate	₦ 445.96
<b>INTERBANK RATES</b>	
OPR	16.50 ▲
Overnight	16.83 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index inched up by 0.07% to close at 10,056.29 points on Wednesday, as gains in the Utilities, Real Estate, and Financials sectors led shares higher. MSCI UAE increased by 0.24% to close at 405.80 points.

**Vietnam:** VN-30 Index inched down by 0.02% to close at 1,056.17 points on Wednesday, as blue-chip companies recorded losses. MSCI Vietnam inched down by 0.07% to close at 655.31 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.26% to close at 10,248.12 points on Wednesday, as gains in the Insurance, Software & Services, and Diversified Financials sectors led shares higher. MSCI Saudi Arabia increased by 0.26% to close at 1,425.12 points.

**India:** Nifty 50 Index increased by 0.28% to close at 18,660.30 points on Wednesday, as gains in the Bank, Auto, and Financial Services sectors led shares higher. MSCI India increased by 0.25% to close at 2,135.86 points.

### News

#### Nigeria:

NDPHC Plans Additional 100,000 Home Units of Renewable Energy  
UK renews commitment to development of Nigeria's agrig sector  
FG approves new whistleblower bill, cancels tax holiday

#### Kenya:

Central Bank seeks to raise Sh70 billion from re-opening of three bonds  
KCB completes acquisition of DRC lender for Sh15 billion  
Safaricom in Sh38 million boost for healthcare

#### Abu Dhabi:

UAE Central Bank raises interest rate after Fed's final increase of year  
Adnoc Drilling to buy two offshore jack-up rigs for \$200m to expand drilling fleet  
Abu Dhabi's ADQ leads consortium to buy stake in Israel's Phoenix Group

#### Saudi Arabia:

Saudi Electricity Co. signs contracts worth \$720m to implement smart grid projects  
Saudi Tadawul signs MoU with Boursa Kuwait to extend coop for capital markets  
Saudi Arabia, Britain sign defense cooperation plan

#### Egypt:

SCZone signs 23 MoU for localization of green fuel industry  
\$ 7.3 billion in trade exchange between Egypt and the United States in 9 months  
Egypt to impose 27.5% new income tax bracket

#### South Africa:

SA inflation is at a five-month low  
October mining output slips due to load shedding, illegal mining  
Rand to reap carry reward as SA's political risks fade

#### India:

WPI inflation declines to 21-month low of 5.85% in November  
SBI board approves raising Rs 10,000 crore capital via bonds  
Govt to sell up to 5% stake in IRCTC Today; floor price at Rs 680 a piece

#### Vietnam:

HCM City receives 6.8 billion USD of remittances so far  
ADB projects Vietnam to grow 7.5% in 2022  
MoF to submit solutions to strengthen bond market

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,056.29	0.1%	-1.9%	-4.7%	18.5%	AED/USD	3.67	0.0%	0.0%
Egypt	15,378.28	1.5%	3.6%	16.0%	29.1%	EGP/USD	24.71	0.2%	57.3%
India	18,660.30	0.3%	0.9%	-0.5%	7.5%	INR/USD	82.51	0.1%	11.0%
Kenya	1,644.37	0.1%	-0.1%	0.4%	-13.6%	KES/USD	123.00	0.0%	8.7%
Nigeria	1,772.28	0.3%	0.2%	3.2%	2.9%	NGN/USD	445.46	0.0%	7.7%
Saudi Arabia	10,248.12	0.3%	0.01%	-6.0%	-9.6%	SAR/USD	3.76	0.0%	0.1%
South Africa	68,179.52	-2.1%	-0.3%	-0.6%	1.7%	ZAR/USD	17.17	-0.5%	7.6%
Vietnam	1,056.17	-0.02%	-0.8%	0.7%	-31.2%	VND/USD	23,545.00	-0.3%	3.3%

## MSCI Emerging Markets

MSCI Frontier	489.49	-0.2%	-0.3%	2.0%	-26.5%	Brent Crude (\$)	82.70	2.5%	6.3%
MSCI Frontier 100	1,134.68	-0.3%	-0.3%	1.9%	-26.0%	Gold (\$)	1,818.70	-0.4%	-0.5%
MSCI Emerging	973.71	0.9%	-0.5%	0.1%	-21.0%	Copper (\$)	8,516.50	0.2%	-12.4%
MSCI World (USD)	2,705.32	-0.4%	1.6%	-0.6%	-16.3%	Coffee (\$)	158.41	0.4%	-20.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nascon	10.90	4.3%	-17.4%	16.50	Dangote Sugar	15.30	-5.6%	-7.3%	14.31
BUA Cement	97.75	2.9%	45.8%	44.10	International Breweries	4.20	-3.4%	-10.6%	6.37
United Capital PLC	13.70	1.5%	38.4%	61.57	Access	8.45	-0.6%	-7.1%	16.50
Transnational Corporation	1.14	0.9%	15.2%	1.10	Guaranty	20.90	-0.5%	-19.6%	213.65
					FBNH	10.95	-0.5%	-4.8%	40.14
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%	0.18	Transcorp Hotels	0.00	0.00	0.0%	0.00
UACN	10.50	10.50	0.0%	1.87	Cap	16.20	15.25	6.2%	0.04
Total	193.00	193.00	0.0%	1.00	Unilever	11.80	10.50	12.4%	0.04
Seplat Petroleum	1050.00	1050.00	0.0%	0.24	Guaranty	20.90	18.00	16.1%	213.65
P Z Cussons	11.30	11.30	0.0%	0.66	Custodian	5.35	4.55	17.6%	0.16

### 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	3.00	11.1%	177.8%	0.01	Aram Group	1.81	-8.6%	-41.6%	0.01
RAK Co. for White Cement & Construction Materials	1.76	9.3%	3.5%	0.18	Gulf Cement Co.	0.50	-8.2%	-29.1%	0.03
Easy Lease Motorcycle Rental	33.90	4.0%	16.9%	11.52	Sudatel Telecom Group Co Limited	0.43	-6.9%	22.9%	1.15
DANA GAS PJSC	0.91	2.9%	-14.0%	7.39	National Corp for Tourism & Hotels	3.18	-5.9%	6.0%	0.48
Abu Dhabi Commercial Bank	9.09	2.8%	6.6%	31.01	ESG EMIRATES STALLIONS GROUP	7.20	-4.3%	-10.0%	13.64
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 PJSC	410.00	410.00	0.0%	245.04	Borouge PLC	2.52	2.52	0.0%	28.72
Al Wathba National Insurance Co.	5.50	5.50	0.0%	0.00	Gulf Medical Projects Company	1.64	1.64	0.0%	0.00
Al Buhaira National Insurance Co.	2.50	2.50	0.0%	0.01	ADNOC Drilling Co.	2.90	2.90	0.0%	32.93
Al Fujairah National Insurance Co.	224.00	224.00	0.0%	0.00	Aram Group	1.81	1.81	0.0%	0.01
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£)
Fawry For Banking Technology And Electronic Payment	5.61	9.6%	-56.2%	96.44	Credit Agricole Egypt	14.21	-4.0%	68.8%	40.38
ELSWEDY ELECTRIC	22.77	6.9%	131.6%	78.28	Sidi Kerir Petrochemicals	13.64	-3.0%	-23.7%	13.61
Orascom Construction	11.30	6.6%	64.2%	37.37	Abou Kir Fertilizers	38.61	-2.6%	79.6%	40.41
Oriental Weavers	2.03	5.6%	-97.3%	73.49	Alexandria Mineral Oils Company	6.28	-2.5%	71.6%	40.49
Eastern Company	20.89	4.5%	94.9%	95.42	Cairo For Investment And Real Estate Development	13.40	-2.1%	299.7%	13.90
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	23.35	23.35	0.0%	23.03	Commercial International Bank	8.84	8.84	0.0%	17.14
T M G Holding	10.10	10.10	0.0%	9.95	Egyptian Kuwaiti Holding	12.67	12.67	0.0%	76.97
Sidi Kerir Petrochemicals	13.64	13.64	0.0%	13.61	Ezz Steel	5.47	5.47	0.0%	235.66
Palm Hills Development Co.	2.11	2.11	0.0%	170.61	Housing & Development Bank	2.30	2.30	0.0%	18.50
Medinet Nasr Housing	145.13	145.13	0.0%	14.41	Juhayna Food Industries	3.63	3.63	0.0%	148.48

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	469.10	2.4%	-1.4%	3108.773	Nestle India Limited	20058.00	-1.6%	1.8%	1644.65
Jsw Steel	759.65	2.1%	15.8%	1109.90	Icici Bank	921.00	-1.3%	24.4%	11418.88
ONGC	147.15	1.9%	3.3%	2604.05	Bharti Airtel	828.90	-1.1%	21.2%	6225.22
UPL	782.00	1.9%	4.7%	1148.27	Asian Paints	3148.00	-1.0%	-6.9%	3483.56
Eicher Motors	3370.00	1.7%	30.0%	2279.67	HUL	2687.00	-0.9%	13.8%	2387.23
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
State Bank Of India	625.30	626.75	-0.2%	8735.79	Wipro	399.85	372.40	7.4%	2004.43
Larsen & Toubro	2193.30	2210.00	-0.8%	3325.40	Tech Mahindra	1063.00	943.70	12.6%	2107.46
Axis Bank	942.00	950.15	-0.9%	8102.19	Tata Motors	418.35	366.20	14.2%	2645.56
Britannia Inds.	4412.00	4452.00	-0.9%	864.53	Kotak Mahindra Bank	1873.00	1631.00	14.8%	7014.31
Indusind Bank	1251.25	1275.80	-1.9%	4885.07	Tata Consultancy Svs.	3363.00	2926.10	14.9%	4079.41

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	15.65	3.3%	-15.2%	0.56	Equity Group Holdings	45.45	-3.1%	-13.8%	23.72
Standard Chartered Bank Kenya Ltd	146.25	2.8%	14.0%	5.54	Kenya Reinsurance Corp Ltd	1.77	-2.7%	-23.0%	0.16
Total Kenya Ltd	25.50	1.6%	2.0%	0.06	The Coop Bank of Kenya Ltd	12.00	-0.8%	-7.3%	5.12
Centum Investment Company	8.14	1.2%	-42.3%	0.18					
Safaricom	25.00	1.0%	-34.1%	41.13					
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	34.60	33.50	3.3%	0.05	Kenya Reinsurance Corporation Ltd	1.77	1.71	3.5%	0.16
Standard Chartered Bank Kenya Ltd	146.25	148.75	-1.7%	5.54	Nation Media Group	15.65	15.00	4.3%	0.56
Total Kenya Ltd	25.50	26.40	-3.4%	0.06	Kengen Limited	3.25	3.10	4.8%	0.39
East African Breweries Limited	165.75	174.75	-5.2%	56.07	Nairobi Securities Exchange Plc	6.84	6.48	5.5%	0.10
Absa Bank Kenya	12.00	12.95	-7.3%	1.80	Centum Investment Company	8.14	7.70	5.7%	0.18

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Mouwasat Medical Services Co.	193.00	6.9%	11.0%	34.08	Alinma Tokio Marine Co.	13.28	-9.9%	-57.7%	8.08
Saudi Kayan Petrochemical Co.	13.00	6.6%	-23.6%	63.16	Bank Albilad	44.95	-4.9%	-3.0%	117.45
Arabian Internet and Communications Services Co.	247.20	6.3%	31.3%	61.46	Tabuk Cement Co.	14.62	-3.8%	-16.3%	1.63
Saudi Tadawul Group Holding Co.	169.80	6.1%	35.0%	120.34	Salama Cooperative Insurance Co.	12.62	-3.4%	-25.8%	2.02
Arabia Insurance Cooperative Co.	10.78	6.1%	-72.7%	0.59	Tanmiah Food Co.	109.80	-3.4%	33.7%	43.25
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.	169.80	169.80	0.0%	67.65	Advanced Petrochemical Co.	39.95	39.95	0.0%	28.72
Elm Co.	333.00	333.00	0.0%	60.39	Al Alamiya for Coop Insurance Co.	11.26	11.26	0.0%	0.71
Saudi Tadawul Group Holding Co.	169.80	169.80	0.0%	120.34	Al Kathiri Holding Co.	36.45	36.45	0.0%	1.19
ACWA POWER Co.	141.60	141.60	0.0%	51.29	Allied Coop Insurance Group	11.44	11.44	0.0%	0.52
Arabian Internet and Communications Services Co.	247.20	247.20	0.0%	61.46	Amana Coop Insurance Co.	8.35	8.35	0.0%	6.93

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Standard Bank Group Ltd	16980.00	51.7%	1.0%	79636.20	Impala Platinum Holdings Ltd	21085.00	-4.6%	-6.3%	71267.30
Discovery Ltd	12356.00	3.7%	0.9%	13344.48	Exxaro Resources Ltd	21146.00	-2.7%	38.3%	14392.60
Sanlam Ltd	4830.00	3.2%	0.9%	55593.30	Aspen Pharmcare Holdings Ltd	14029.00	-1.9%	-37.5%	13515.54
Nedbank Group Ltd	21050.00	2.5%	0.2%	41258.00	Mondi PLC	31318.00	-1.7%	-20.7%	13283.22
MTN Group	13334.00	1.8%	0.1%	57602.88	AngloGold Ashanti Ltd	33315.00	-1.7%	1.4%	48639.90
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	10000.00	10536.00	-5.1%	9177.40	Mr Price Group Ltd	15708.00	15708.00	0.0%	15142.59
Investec PLC	10190.00	10734.00	-5.1%	16202.10	SPAR Group Ltd/The	12909.00	12909.00	0.0%	14086.81
British American Tobacco PLC	69870.00	74444.00	-6.1%	32398.72	Clicks Group Ltd	28410.00	26993.00	5.2%	17688.52
The Bidvest Group Ltd	22116.00	23636.00	-6.4%	12792.78	Aspen Pharmcare Holdings Ltd	14029.00	12889.00	8.8%	13515.54
Glencore PLC	11303.00	12259.00	-7.8%	19204.94	Vodacom Group Ltd	12940.00	11562.00	11.9%	21739.20

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Rubber Group	15500.00	3.3%	-58.1%	52.743,80	Phat Dat Real Estate Development Corp	15000.00	-3.2%	-84.2%	113.949,90
Sai Gon Thuong Tin Commercial	23250.00	3.1%	-26.2%	484.681,43	Saigon Securities Inc	20100.00	-1.5%	-61.2%	424.427,36
Petrovietnam Gas	107500.00	1.8%	11.7%	29.743,58	Vingroup	60800.00	-1.3%	-36.1%	177.904,46
No Va Land Invest	18500.00	1.7%	-79.7%	358.201,99	FPT Corp	76300.00	-1.2%	-18.0%	88.881,22
Hoa Phat Group	19200.00	1.1%	-58.6%	660.553,87	Masan Group Corp	96000.00	-1.0%	-43.9%	98.644,73
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.	179000.00	197900.00	-9.6%	45.061,74	Vietnam Rubber Group	15500.00	15500.00	0.0%	52.743,80
Vinamilk	77500.00	87004.15	-10.9%	274.548,44	Mobile World Inv. Corp	46450.00	46450.00	0.0%	101.588,50
Petrovietnam Gas	107500.00	130442.43	-17.6%	29.743,58	No Va Land Invest	18500.00	18500.00	0.0%	358.201,99
Vietcombank	78800.00	96000.00	-17.9%	85.500,38	Phat Dat Real Estate Development Corp	15000.00	15000.00	0.0%	113.949,90
Asia Commercial JS Bank	23150.00	29080.00	-20.4%	75.836,36	Vietnam National Petroleum Group	31350.00	31300.00	0.2%	14.686,36

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