

Daily Market Report

20 December 2022

JSE

JSE All-Share Index increased by 0.51% and closed at 73,359.63 points on Monday, as the Financial sector recorded gains.

BRVM

BRVM Cosite Index declined by 0.64% and closed at 198.27 points on Monday, with Tractafric Motors Côte d'Ivoire and Filtisac Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index increased by 0.20% to close at 49,414.96 points on Monday, as the Consumer Goods and Banking sectors recorded gains.

EGX

EGX 30 Index declined by 0.70% and closed at 14,738.60 points on Monday, as the market lost LE 1.4 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index inched up by 0.06% to close at 826.34 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.51%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.64%
NGX Nigerian Stock Exchange	▲	0.20%
EGX Egyptian Stock Exchange	▼	0.70%
ESG Casablanca Stock Exchange	▲	0.06%

African Markets

Nigeria: NGX 30 Index was up by 0.12% to close at 1,787.85 points on Monday. International Breweries and Guaranty were the top gainers.

Egypt: EGX 30 Index declined by 0.70% and closed at 14,738.60 points on Monday, as the market lost LE 1.4 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index was up by 0.18% and closed at 1,655.86 points on Monday. Stanbic Holdings and Kenya Power & Lighting Limited were the top gainers.

South Africa: JSE Top 40 Index increased by 0.55% and closed at 67,262.00 points on Monday, as the Financial sector recorded gains.

Nigeria Key Indicators

	Current
Inflation	21.47%
Exchange Rate	₦ 446.46
INTERBANK RATES	
OPR	9.50 ▼
Overnight	10.25 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.30% to close at 10,358.40 points on Monday, as gains in the Real Estate, Utilities, and Financials sectors led shares higher. MSCI UAE increased by 0.36% to close at 422.20 points.

Vietnam: VN-30 Index dropped by 1.30% to close at 1,050.22 points on Monday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.30% to close at 639.85 points.

Saudi Arabia: Tadawul All Share Index declined by 0.64% to close at 10,186.18 points on Monday, as losses in the Capital Goods, Health Care Equipment & Svc, and Retailing sectors pushed shares lower. MSCI Saudi Arabia declined by 0.62% to close at 1,413.36 points.

India: Nifty 50 Index increased by 0.83% to close at 18,420.45 points on Monday, as gains in the Bank, Auto, and Financial Services sectors led shares higher. MSCI India increased by 0.91% to close at 2,109.66 points.

News

Nigeria:

FG begins 11 power projects, plans 3,750MW generation
MTN shareholders approve 7.5 billion shares cancellation
NGX retail transactions hit N26.62bn

Kenya:

Kenya's import-export gap widens to Sh1.37 trillion
KCB joins race of financing Sh3.5 trillion DRC deals
Kenya's External Debt Hits KES 4.35 Trillion in October 2022

Abu Dhabi:

UAE's GDP expected to grow at 7.6% in 2022
Abu Dhabi hotels post Dh4.7b revenue in Jan-Nov period
Abu Dhabi's AI company G42 to lead Astra Tech's \$500m funding round

Saudi Arabia:

Saudi-held US Treasury bonds rise 3.9% in Oct to reach \$121.1bn
Saudi Arabia's crude oil exports at 30-month high: JODI data
NEOM firm signs credit facility deals with banks for green hydrogen plant

Egypt:

Egypt receives \$11B financing in 2022
Egypt, Maldives ink MoU for cooperation in environment protection
Egyptian Tax Authority pilots unified payroll tax system

South Africa:

Woolworths finally sells David Jones
Shoprite wants parity with Pick n Pay in Competition Tribunal agreement
Stor-Age invests more than R170m in solar energy

India:

Yes Bank completes transfer of \$5.81 bn worth bad loans to JC Flowers
HDFC hikes loan rates, start at 8.65%
Note in circulation rise 8% annually to Rs 32 lakh crore: FM

Vietnam:

State budget revenue surpasses nearly 20% of estimate
FPT Retail, Japanese partners to invest in health food factory
Coffee exports likely to hit 4 billion USD in 2022

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	10,358.40	0.3%	0.3%	-1.8%	22.0%	AED/USD	3.67	0.0%	0.0%
Egypt	14,738.60	-0.7%	-2.7%	11.2%	23.8%	EGP/USD	24.73	0.3%	57.4%
India	18,420.45	0.8%	0.8%	-1.8%	6.1%	INR/USD	82.58	-0.1%	11.1%
Kenya	1,655.86	0.2%	0.2%	1.1%	-13.0%	KES/USD	123.10	0.0%	8.8%
Nigeria	1,787.85	0.1%	0.1%	4.1%	3.8%	NGN/USD	445.48	0.0%	7.7%
Saudi Arabia	10,186.18	-0.6%	-1.0%	-6.5%	-10.1%	SAR/USD	3.76	0.0%	0.1%
South Africa	67,261.97	0.5%	0.5%	-1.9%	0.3%	ZAR/USD	17.35	-1.6%	8.7%
Vietnam	1,050.22	-1.3%	-1.3%	0.1%	-31.6%	VND/USD	23,715.00	0.5%	4.1%

MSCI Emerging Markets

MSCI Frontier	48.24	-90.0%	-90.0%	-90.0%	-92.8%	Brent Crude (\$)	79.80	1.0%	2.6%
MSCI Frontier 100	1,116.84	-0.5%	-0.5%	0.3%	-27.2%	Gold (\$)	1,797.70	-0.1%	-1.7%
MSCI Emerging	957.64	0.0%	0.0%	-1.5%	-22.3%	Copper (\$)	8,320.00	0.6%	-14.4%
MSCI World (USD)	2,585.89	-0.8%	-0.8%	-5.0%	-20.0%	Coffee (\$)	155.93	-3.1%	-21.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	4.55	5.8%	-3.2%	5.28	P Z Cussons	11.50	-7.3%	88.5%	15.09
Guaranty	21.60	3.3%	-16.9%	352.21	Axamansard	1.80	-1.6%	-19.3%	1.02
Custodian	5.45	1.9%	-30.1%	2.14	FBNH	10.85	-0.5%	-5.7%	28.04
Access	8.55	1.2%	-6.0%	24.91	Zenith	24.00	-0.4%	-4.0%	90.68
Sterling	1.37	0.7%	-8.7%	2.69					
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%	0.14	Transcorp Hotels	0.00	0.00	0.0%	0.00
Total	193.00	193.00	0.0%	1.72	Unilever	11.80	10.50	12.4%	0.74
Seplat Petroleum	1050.00	1050.00	0.0%	4.09	Cap	17.80	15.25	16.7%	0.37
P Z Cussons	11.50	11.50	0.0%	15.09	Custodian	5.45	4.55	19.8%	2.14
Presco	120.50	120.50	0.0%	11.99	Guaranty	21.60	18.00	20.0%	352.21

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Medical Projects Company	1.88	14.6%	10.6%	0.03	Gulf Cement Co.	0.50	-8.3%	-29.3%	0.26
Abu Dhabi Ports Company	6.04	3.6%	66.9%	51.40	Aram Group	1.52	-7.9%	-51.0%	4.06
Bank of Sharjah	0.49	3.2%	-21.0%	0.70	Al Fujairah National Insurance Company	210.00	-6.3%	0.0%	0.09
Abu Dhabi Ship Building Co.	4.02	3.1%	0.5%	0.21	The National Bank of Ras Al Khaimah	4.36	-6.0%	-3.1%	3.66
Abu Dhabi National Hotels Co.	3.84	2.7%	1.6%	0.08	FOODCO NATIONAL FOODSTUFF	3.20	-4.5%	196.3%	0.02
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	Ras Al Khaimah Poultry & Feeding Co.	1.30	1.30	0.0%	0.00
Al Buhaira National Insurance Co.	2.55	2.55	0.0%	0.00	ANAN INVESTMENT HOLDIN	4.07	4.07	0.0%	0.00
Al Fujairah National Insurance Co.	210.00	0.00	0.0%	0.09	The National Investor	0.45	0.45	0.0%	0.00
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Sawaeed Holding	6.70	6.70	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	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£)
Palm Hills Development Co.	2.28	10.7%	-73.8%	231.02	Egyptian Financial Group-Hermes Holding Co.	31.77	-4.6%	114.5%	42.62
Alexandria Containers and goods	18.80	9.2%	123.8%	32.91	Cleopatra Hospital Co.	42.60	-3.7%	765.9%	394.39
ELSWEDY ELECTRIC	23.01	7.8%	134.1%	108.85	Ibnsina Pharma	8.02	-3.0%	97.1%	14.69
Misir Fertilizers Production Co.	94.60	6.7%	-3.0%	26.22	Eastern Company	19.28	-1.8%	79.9%	28.07
Sidi Kerir Petrochemicals	13.44	5.2%	-24.8%	12.25	Credit Agricole Egypt	14.71	-1.4%	79.9%	28.07
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	25.25	25.25	0.0%	24.20	Commercial International Bank	8.56	8.56	0.0%	2.70
T M G Holding	10.12	10.12	0.0%	9.72	Egyptian Kuwaiti Holding	12.09	12.09	0.0%	33.54
Sidi Kerir Petrochemicals	13.44	13.44	0.0%	12.25	Ezz Steel	5.25	5.25	0.0%	109.42
Palm Hills Development Co.	2.28	2.28	0.0%	231.02	Housing & Development Bank	2.22	2.22	0.0%	16.01
Medinet Nasr Housing	141.00	141.00	0.0%	21.35	Juhayna Food Industries	3.43	3.43	0.0%	52.32

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	895.30	4.1%	22.6%	4577.180	Tata Consultancy Svs.	3205.25	-1.1%	-14.3%	6808.70
Adani Enterprises Limited	4101.00	3.0%	139.9%	6623.95	ONGC	145.95	-0.9%	2.5%	1553.36
Mahindra & Mahindra	1289.00	3.0%	54.0%	3537.36	Tata Motors	418.05	-0.8%	-13.3%	4101.58
Eicher Motors	3382.00	2.8%	30.5%	2995.12	Infosys	1510.00	-0.8%	-20.0%	9381.53
Power Grid Corp Of India	218.85	2.7%	7.1%	1265.90	Sun Pharma Industries	987.45	-0.6%	16.8%	1524.83
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.	4528.00	4537.00	-0.2%	1488.80	Divi's Laboratories Ltd	3347.00	3195.15	4.8%	543.30
Axis Bank	948.00	950.15	-0.2%	4563.42	Tech Mahindra	1026.50	943.70	8.8%	1563.99
HUL	2713.20	2741.60	-1.0%	4183.84	Tata Consultancy Svs.	3205.25	2926.10	9.5%	6808.70
Larsen & Toubro	2184.85	2211.60	-1.2%	3456.94	Infosys	1510.00	1355.00	11.4%	9381.53
Bharti Airtel	839.00	860.55	-2.5%	5353.60	Kotak Mahindra Bank	1859.75	1631.00	14.0%	3173.06

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	97.50	5.1%	11.7%	0.02	Centum Investment Co.	8.04	-2.9%	-43.0%	0.06
Kenya Power & Lighting Limited	1.49	2.1%	-14.9%	0.46	Nation Media Group	15.55	-2.8%	-15.7%	0.02
KCB Group	37.90	1.7%	-16.6%	2.92	Kengen Limited	3.22	-2.1%	-23.2%	0.32
Total Kenya Ltd	23.25	1.5%	-7.0%	0.08	WPP Scangroup	3.15	-1.6%	-23.9%	0.02
Bamburi Cement Limited	31.50	1.1%	-17.1%	0.14	Safaricom	24.90	-0.2%	-34.4%	6.58
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	36.05	36.05	0.0%	0.36	Nation Media Group	15.55	15.00	3.7%	0.02
East African Breweries Limited	166.00	174.75	-5.0%	4.02	Kengen Limited	3.22	3.10	3.9%	0.32
Absa Bank Kenya	12.20	12.95	-5.8%	0.69	Centum Investment Company	8.04	7.70	4.4%	0.06
Standard Chartered Bank Kenya Ltd	140.00	148.75	-5.9%	0.04	Nairobi Securities Exchange	6.82	6.48	5.2%	0.03
Stanbic Holdings	97.50	108.00	-9.7%	0.02	Bamburi Cement Ltd	31.50	29.10	8.2%	0.14

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Alamar Foods Co.	136.40	5.1%	11.8%	19.42	Tourism Enterprise Co.	17.86	-10.0%	-89.5%	15.95
Jadwa REIT Saudi Fund	13.00	4.7%	-13.2%	1.58	Saudi Industrial Export Co.	30.10	-7.4%	-20.5%	18.42
Middle East Paper Co.	31.50	3.1%	-27.8%	67.60	National Medical Care Co.	73.00	-6.8%	16.6%	20.22
AlJazira Mawten REIT Fund	16.92	2.6%	-25.7%	0.57	Raydan Food Co.	21.00	-5.8%	4.0%	1.39
Nahdi Medical Co.	170.40	2.5%	13.6%	61.45	Alinma Tokio Marine Co.	12.26	-5.7%	-61.0%	1.62
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.	170.40	170.40	0.0%	61.45	Advanced Petrochemical Co.	39.90	39.90	0.0%	16.19
Elm Co.	342.20	342.20	0.0%	58.84	Al Alamiya for Coop Insurance Co.	11.04	11.04	0.0%	0.32
Saudi Tadawul Group Holding Co.	178.00	178.00	0.0%	89.56	Al Kathiri Holding Co.	35.90	35.90	0.0%	1.03
ACWA POWER Co.	148.00	148.00	0.0%	80.02	Alkhabeer REIT Fund	7.55	7.55	0.0%	0.21
Arabian Internet and Communications Services Co.	249.00	249.00	0.0%	35.59	Allied Coop Insurance Group	11.14	11.14	0.0%	0.31

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
FirstRand Ltd	6246.00	4.7%	4.9%	85695.12	Mondi	30064.00	-3.0%	-23.9%	32769.76
Standard Bank Group Ltd	17597.00	4.5%	25.7%	78834.56	Reinet Investments SCA	32881.00	-0.2%	15.0%	4004.91
Absa Group Ltd	19691.00	3.9%	29.1%	58088.45	Naspers Ltd	283000.00	-0.1%	14.5%	177760.79
Nedbank Group Ltd	21331.00	3.8%	21.9%	32209.81					
Sanlam Ltd	4903.00	3.4%	-17.4%	36576.38					
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 PLC	10443.00	10734.00	-2.7%	12636.03	SPAR Group Ltd/The	11820.00	11808.00	0.1%	3633.33
Investec Ltd	10254.00	10536.00	-2.7%	7575.35	Mr Price Group Ltd	15794.00	15422.00	2.4%	14015.55
British American Tobacco PLC	70353.00	74444.00	-5.5%	29010.06	Clicks Group Ltd	28740.00	26993.00	6.5%	27348.90
The Bidvest Group Ltd	22198.00	23636.00	-6.1%	18700.26	Aspen Pharmcare Holdings Ltd	13520.00	12889.00	4.9%	8095.10
Glencore PLC	11391.00	12259.00	-7.1%	26631.73	Vodacom Group Ltd	12454.00	11562.00	7.7%	21545.42

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vincom Retail	27300.00	4.2%	-9.3%	71,300,43	Phat Dat Real Estate Development Corp	13800.00	-4.8%	-85.5%	114,577,75
Masan Group Corp	95000.00	1.6%	-44.4%	117,714,86	No Va Land Invest	17500.00	-3.9%	-80.8%	435,415,68
Techcombank	29250.00	0.3%	-41.5%	279,002,96	Vingroup JSC	56500.00	-3.3%	-40.6%	165,472,28
Ho Chi Minh City Devp	17350.00	0.3%	-43.8%	76,104,25	Vietnam Rubber Group JSC	15300.00	-3.2%	-58.6%	37,496,96
					PetroVietnam Power Corp	11100.00	-3.1%	-36.6%	106,075,71
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	77000.00	87004.15	-11.5%	188,201,62	Vietnam Rubber Group	15300.00	15300.00	0.0%	37,496,96
Saigon Beer Alcohol Beverage Corp.	175000.00	197900.00	-11.6%	28,667,49	Mobile World Inv. Corp	47150.00	47150.00	0.0%	181,066,61
Vietcombank	79200.00	96000.00	-17.5%	60,372,71	No Va Land Invest	17500.00	17500.00	0.0%	435,415,68
Petrovietnam Gas	105200.00	130442.43	-19.4%	47,657,56	Phat Dat Real Estate Development Corp	13800.00	13800.00	0.0%	114,577,75
Asia Commercial JS Bank	22750.00	29080.00	-21.8%	77,553,67	Vietnam National Petroleum Group	30400.00	30400.00	0.0%	15,038,86

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