

# Daily Market Report

## 15 September 2023

### JSE

JSE All-Share Index climbed by 1.43% and closed at 74,354.37 points on Thursday, as the Resources and Industrial sectors recorded gains.

### BRVM

BRVM Composite Index increased 0.33% and closed at 216.07 points on Thursday, with Coris Bank International and Saph Côte d'Ivoire being the top gainers.

### NSE

NGX All-Share Index decreased marginally by 0.06% to close at 67,335.30 on Thursday, as the Consumer Goods, Industrials, and Banking sectors recorded losses.

### EGX

EGX 30 Index increased by 0.92% and closed at 19,540.33 points on Thursday, as the market gained LE 11 billion of market cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index inched up by 0.07% to close at 875.65 points on Thursday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲	1.43%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.33%
<b>NGX</b> Nigerian Stock Exchange	▼	0.06%
<b>EGX</b> Egyptian Stock Exchange	▲	0.92%
<b>ESG</b> Casablanca Stock Exchange	▲	0.07%

### African Markets

**Nigeria:** NGX 30 Index decreased by 0.20% to close at 2,480.78 points on Thursday. FCMB and Transcorp were the top losers.

**Egypt:** EGX 30 Index increased by 0.92% and closed at 19,540.33 points on Thursday, as the market gained LE 11 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index decreased by 0.29% and closed at 1,535.82 points on Thursday. KCB Group Plc and Nairobi Securities Exchange Plc were the top losers.

**South Africa:** JSE Top 40 Index climbed by 1.52% and closed at 68,806.25 points on Thursday, as the Resources and Industrial sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	24.08%
Exchange Rate (I&E window)	₦ 780.00
<b>INTERBANK RATES</b>	
OPR	23.50 ▲
Overnight	23.75 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index increased by 0.42% to close at 9,796.39 points on Thursday, as gains in the Telecommunication, Financials, and Real Estate led shares higher. MSCI UAE increased by 0.31% to close at 399.36 points.

**Vietnam:** VN-30 Index declined by 1.11% to close at 1,234.06 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam dropped by 1.98% to close at 722.64 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.29% to close at 11,154.54 points on Thursday, as gains in the Energy, Utilities, and Pharma, Biotech & Life Science sectors led shares higher. MSCI Saudi Arabia was up by 0.16% and closed at 1,435.93 points.

**India:** Nifty 50 Index was up by 0.16% to close at 20,103.10 points on Thursday, as gains in the Realty, Metal, and Auto sectors led shares higher. MSCI India increased by 0.37% to close at 2,265 points.

### News

#### Nigeria:

MTN to boost broadband penetration with new spectrum  
Fintechs boost consumer loans to N2.35tn  
Manufactured goods imports gulp \$6.7bn in six months – Report

#### Kenya:

CBK Accepts Bids Worth KSh 19.5 billion At Weekly Treasury Bills Auction  
East African Cables bags Sh232m Kenya Power tender  
Rubis takes Sh3.9bn forex hit in Kenya

#### Abu Dhabi:

Dubai on a roll with Swiss investors as UAE strikes up \$21bn of trade with Switzerland  
MAG unveils new \$544mln project in Business Bay, Dubai  
Mubadala's Asset Manager Taps Apollo to Back Bespoke Investments

#### Saudi Arabia:

Riyadh real estate expo sees over \$29bn deals signed  
Saudi and Omani firms partner to boost 3D printing in real estate  
PIF-owned ROSHN plans to spend \$2.7bn on construction of real estate projects

#### Egypt:

\$600M investments by Arab & Chinese companies to set up wind power plants  
Egypt Suez Canal Economic Zone revenues hit all-time high of EGP 6 bln in FY2022/2023  
Egypt's universal healthcare system to cost over EGP 360 bln: Minister

#### South Africa:

SoftBank resists temptation to try for more with \$4.87bn Arm IPO  
FirstRand posts 11% rise in annual profit as interest rates help  
Steinhoff goes after former executive Stéhan Grobler in R300m lawsuit

#### India:

India's Infosys signs \$1.5 billion contract to leverage AI solutions  
PSUs look to buy oil with \$600 million stuck in Russia  
Cognizant's Rs 19,000cr buyback attracts dividend tax: Tribunal

#### Vietnam:

Vietnam, South Africa explore chances for stronger trade ties  
HCM City, IMF collaborate in green economic development  
Vietnam seeks ways to expand cross-border e-commerce growth

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,796.39	0.4%	1.1%	-0.1%	-4.1%	AED/USD	3.67	0.0%	0.0%
Egypt	19,540.33	0.9%	0.8%	3.5%	33.9%	EGP/USD	30.95	0.2%	25.3%
India	20,103.10	0.2%	1.4%	4.4%	11.0%	INR/USD	83.12	0.2%	0.5%
Kenya	1,535.82	-0.3%	-0.4%	-0.3%	-8.4%	KES/USD	146.55	0.0%	18.7%
Nigeria	2,480.78	-0.2%	-1.1%	1.3%	34.6%	NGN/USD	780.00	2.8%	40.8%
Saudi Arabia	11,154.54	0.3%	-0.5%	-2.9%	6.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	68,806.25	1.5%	1.2%	-0.7%	2.8%	ZAR/USD	19.05	1.2%	11.9%
Vietnam	1,234.06	-1.1%	-1.2%	-0.04%	22.8%	VND/USD	24,230.00	0.5%	2.5%

## MSCI Emerging Markets

MSCI Frontier	500.93	-0.9%	-1.2%	-1.8%	6.1%	Brent Crude (\$)	93.70	2.0%	9.1%
MSCI Frontier 100	1,153.39	-0.9%	-1.4%	-1.8%	5.8%	Gold (\$)	1,932.80	0.02%	5.8%
MSCI Emerging	982.11	0.8%	0.8%	0.2%	2.7%	Copper (\$)	8,417.50	0.01%	0.5%
MSCI World (USD)	2,982.69	0.9%	1.1%	-0.1%	14.6%	Coffee (\$)	152.74	1.2%	-2.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBA	16.40	8.3%	115.8%	4892.25	FCMB	6.03	-5.5%	56.6%	21.93
Stanbic IBTC	68.00	4.6%	103.3%	83.14	Transnational Corporation	6.30	-4.7%	457.5%	176.52
Julius Berger	31.00	3.3%	26.5%	14.26	United Capital PLC	16.00	-3.0%	14.3%	209.20
Cadbury	16.10	2.5%	35.3%	15.01	Axamansard	3.85	-3.0%	92.5%	42.43
Lafarge Africa	29.50	1.7%	22.9%	99.84	Guaranty	36.00	-3.0%	56.5%	419.98
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	6.03	6.03	0.0%	21.93	Nestle	1025.00	764.90	34.0%	281.16
Zenith	33.00	33.00	0.0%	529.45	Unilever	14.50	10.50	38.1%	7.01
Wema	5.26	5.26	0.0%	15.20	Cap	21.20	15.25	39.0%	0.12
UBA	16.40	16.40	0.0%	4892.25	UBN	6.55	4.65	40.9%	0.81
UACN	10.60	10.60	0.0%	7.51	Nigerian Breweries	38.75	24.40	58.8%	801.53

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Pharmaceutical Industries	0.85	3.1%	-27.2%	0.03	RAK Co. for White Cement & Const Materials	1.34	-6.9%	-25.1%	0.15
National Marine Dredging Co.	25.20	2.4%	2.9%	31.69	FOODCO NATIONAL FOODSTUFF PrJSC	1.61	-6.4%	-36.1%	0.00
Abu Dhabi National Hotels Co.	10.44	2.4%	172.6%	16.63	The National Bank of Ras Al Khaimah	5.51	-3.3%	17.2%	0.37
Gulf Cement Co.	0.45	2.3%	-12.7%	0.00	Abu Dhabi Nat. Co. Building Materials	0.35	-3.3%	91.3%	0.08
Emirates Telecom. Group Company	20.12	2.1%	-12.0%	42.41	Manazel PJSC	0.40	-2.7%	0.0%	6.35
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 Khazna Insurance Co.	0.24	0.24	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Al Buhaira National Insurance Company	2.87	2.87	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Oman & Emirates Investment Holding Co	0.41	0.41	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	0.0%	0.00
Umm Al Qaiwain General Investment Co. P.S.C	1.26	1.26	0.0%	0.00	Al Dhafra Insurance Co.	4.90	4.90	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£)
T M G Holding	13.21	11.7%	32.2%	147.42	Egyptian Tourism Resorts	4.26	-3.0%	117.3%	5.71
Cleopatra Hospital Company	4.08	3.8%	-39.4%	28.48	Emaar Misr for Development SAE	3.24	-1.8%	4.5%	9.85
Abu Dhabi Islamic Bank- Egypt	24.84	3.5%	38.2%	28.81	Belton Financial Hld	3.07	-1.3%	158.0%	129.19
Abou Kir Fertilizers	58.00	2.7%	49.5%	49.04	Alexandria Mineral Oils Company	8.79	-1.2%	39.1%	10.46
Palm Hills Development Company	2.04	1.9%	-65.4%	58.00	Fawry For Banking Technology And Electronic Payment	5.56	-1.2%	6.1%	24.30
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	28.90	28.99	-0.3%	21.46	Cleopatra Hospital Co.	4.08	3.70	10.3%	28.48
Sidi Kerir Petrochemicals - SIDPEC	25.40	25.97	-2.2%	19.54	Tenth Of Ramadan Pharmaceutical Industries & Diagnostic	2.24	1.91	17.3%	15.39
Misr Fertilizers Production Company - Mopco	251.27	270.00	-6.9%	20.15	E-finance For Digital and Financial Investments	17.40	13.22	31.6%	10.56
Orascom Construction PLC	120.00	129.00	-7.0%	31.29	Taaleem Management Services	3.90	2.72	43.4%	17.78
Oriental Weavers	16.39	18.43	-11.1%	5.72	T M G Holding	13.21	6.88	92.0%	147.42

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
UPL	631.80	3.9%	-11.8%	5764.745	Asian Paints	3240.00	-1.2%	4.9%	3578.74
Hindalco Industries	499.15	3.3%	5.5%	8071.78	HDFC Life Insurance Company Ltd	643.90	-1.0%	13.7%	2418.23
Mahindra & Mahindra	1574.00	2.4%	26.0%	3454.54	Coal India	277.25	-0.9%	23.2%	3353.34
Divi's Laboratories Limited	3826.00	2.0%	12.1%	1837.55	Britannia Inds.	4574.00	-0.7%	6.2%	2169.35
Eicher Motors	3383.00	1.9%	4.8%	1469.17	LTIMINDTREE LIMITED	5500.00	-0.7%	26.0%	2218.98
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	1020.00	1022.40	-0.2%	7995.07	HUL	2500.00	2393.00	4.5%	5203.90
Hcl Technologies	1285.00	1291.75	-0.5%	3406.96	Power Grid Corp Of India	195.25	186.35	4.8%	2129.49
ONGC	187.85	188.90	-0.6%	3324.08	UPL	631.80	576.95	9.5%	5764.74
Tech Mahindra	1279.30	1289.35	-0.8%	4212.37	Kotak Mahindra Bank	1822.50	1643.50	10.9%	4661.86
Bharti Airtel	912.80	920.60	-0.8%	5040.69	Reliance Industries	2456.00	2180.00	12.7%	11301.10

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	18.95	5.0%	-20.5%	0.01	KCB Group Plc	22.65	-1.7%	-40.6%	11.37
WPP Scangroup Plc	2.69	3.1%	-10.6%	0.01	Nairobi Securities Exchange Plc	5.94	-1.0%	-12.4%	0.22
Stanbic Holdings	112.00	1.6%	9.8%	0.24	Kengen Limited	2.29	-0.9%	-28.9%	0.16
Safaricom Plc	15.50	1.3%	-35.8%	235.11	The Cooperative Bank of Kenya Ltd	11.80	-0.4%	-4.1%	0.84
Kenya Reinsurance Corporation Ltd	1.85	1.1%	1.1%	0.03					
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	40.30	41.70	-3.4%	22.30	KCB Group Plc	22.65	22.65	0.0%	11.37
Standard Chartered Bank Kenya Ltd	160.75	171.00	-6.0%	0.55	WPP Scangroup Plc	2.69	2.57	4.7%	0.01
Absa Bank Kenya	11.80	12.95	-8.9%	1.11	Total Kenya Ltd	18.95	18.05	5.0%	0.01
Stanbic Holdings	112.00	129.75	-13.7%	0.24	British American Tobacco Kenya Ltd	420.00	400.00	5.0%	0.29
The Cooperative Bank of Kenya Ltd	11.80	14.00	-15.7%	0.84	Equity Group Holdings Plc	37.70	35.80	5.3%	25.40

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Aldawaa Medical Services Co.	94.00	7.6%	30.7%	46.49	Saudi Arabian Amiantit Co.	47.40	-9.0%	45.8%	49.25
Saudi Arabia Refineries Co.	95.50	6.0%	31.9%	119.89	The Mediterranean and Gulf Insurance and Reinsurance Co.	13.76	-6.9%	59.6%	52.09
United Electronics Co.	76.50	4.8%	10.7%	42.02	National Agricultural Marketing Co.	27.15	-6.4%	57.8%	35.67
Wafrah for Industry and Development Co.	44.80	4.2%	75.0%	186.09	Al-Baha Investment and Development Co.	0.15	-6.3%	-98.7%	1.32
Leejam Sports Co.	139.00	4.0%	65.5%	53.84	Al Sagr Cooperative Insurance Co.	25.70	-5.9%	83.0%	76.39
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)
Jamjoom Pharmaceuticals Factory Co.	114.00	114.00	0.0%	11.66	Abdullah Al Othaim Markets Co.	14.22	14.22	0.0%	27.04
Al Mawarid Manpower Co.	128.00	128.00	0.0%	21.78	Abdulmohsen Alhokair Group for Tourism and Development	2.22	2.22	0.0%	2.84
Saudi Aramco Base Oil Co.	149.00	149.00	0.0%	359.64	Advanced Petrochemical Co.	40.80	40.80	0.0%	30.26
Americana Restaurants International PLC	4.37	4.37	0.0%	20.29	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Power & Water Utility Co for Jubail & Yanbu	65.50	65.50	0.0%	70.71	Al-Baha Investment and Development Co.	0.15	0.15	0.0%	1.32

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings Ltd	9235.00	9.1%	-56.7%	45159.15	FirstRand Ltd	6880.00	-3.2%	10.8%	155488.00
Sibanye Stillwater Ltd	2971.00	7.9%	-33.6%	54666.40	Clicks Group Ltd	25948.00	-1.9%	-3.9%	21372.85
Anglo American PLC	52385.00	7.6%	-21.0%	114723.15	Growthpoint Properties Ltd	1119.00	-1.8%	-23.0%	14726.04
Northam Platinum Holdings Ltd	10660.00	6.3%	-43.0%	37523.20	Shoprite Holdings Ltd	24959.00	-1.4%	10.4%	33694.65
Sasol Ltd	24436.00	5.7%	-9.3%	44229.16	Standard Bank Group Ltd	18088.00	-1.3%	7.8%	60233.04
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)
Anheuser-Busch InBev SA/NV	106865.00	107000.00	-0.1%	15165.21	Nedbank Group Ltd	20560.00	20367.00	0.9%	27961.60
Remgro Ltd	15314.00	15345.00	-0.2%	12200.66	Growthpoint Properties Ltd	1119.00	1106.00	1.2%	14726.04
Aspen Pharmacare Holdings Ltd	16796.00	16868.00	-0.4%	13233.40	Mondi PLC	31175.00	30540.00	2.1%	29130.23
Bid Corp Ltd	44135.00	44575.00	-1.0%	39702.08	Anglo American PLC	52385.00	49999.00	4.8%	114723.15
Reinet Investments SCA	39516.00	39922.00	-1.0%	17012.43	Sasol Ltd	24436.00	23200.00	5.3%	44229.16

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Viet Nam International Commercial Joint Stock Bank	21700.00	3.3%	14.2%	465.666,37	Vingroup JSC	55500.00	-6.3%	3.2%	1.529.927,35
Vietnam JSC Bank	33200.00	2.0%	21.8%	470.206,13	Vinhomes	49000.00	-6.0%	2.1%	587.923,69
Military Commercial Bank	19150.00	0.5%	12.0%	285.773,17	FPT Corp	95900.00	-2.1%	24.7%	224.153,77
Vinamilk	79400.00	0.4%	4.3%	196.234,43	Hoa Phat Group JSC	27800.00	-2.1%	54.4%	973.633,07
Petrovietnam Gas	106000.00	0.4%	4.4%	58.647,31	Masan Group Corp	78600.00	-1.9%	-15.5%	143.699,60
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn ₫)
FPT Corp	95900.00	97944.43	-2.1%	224.153,77	BaoViet Holdings	45200.00	45200.00	0.0%	30.317,87
Bank for Inv. and Devp	46750.00	49950.00	-6.41%	89.081,91	Saigon Beer Alcohol Beverage Corp.	85200.00	85200.00	0.0%	100.186,74
Vietcombank	89100.00	96000.00	-7.2%	134.028,51	Vietjet Aviation	99000.00	99000.00	0.0%	101.041,30
Vinamilk	79400.00	87004.15	-8.7%	196.234,43	Vinhomes	49000.00	47200.00	3.8%	587.923,69
Vietnam JSC Bank	33200.00	38200.00	-13.1%	470.206,13	Tien Phong Commercial Joint Stock Bank	19000.00	18300.00	3.8%	108.608,00

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