

Daily Market Report

05 October 2023

JSE

JSE All-Share Index decreased by 0.29% and closed at 70,564.69 points on Wednesday, as the Resources and Financial sectors recorded losses.

BRVM

BRVM Composite Index decreased 0.33% and closed at 207.90 points on Wednesday, with Nestle Côte d'Ivoire and Setao Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index decreased by 0.43% to close at 66,482.28 on Wednesday, as the Banking and Insurance sectors recorded losses.

EGX

EGX 30 Index increased by 0.84% and closed at 19,873.31 points on Wednesday, as the market gained LE 14 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index declined by 0.61% to close at 862.36 points on Wednesday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.29%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.33%
NGX Nigerian Stock Exchange	▼	0.43%
EGX Egyptian Stock Exchange	▲	0.84%
ESG Casablanca Stock Exchange	▼	0.61%

African Markets

Nigeria: NGX 30 Index decreased by 0.41% to close at 2,446.19 points on Wednesday. MTN Nigeria and Fidelity were the top losers.

Egypt: EGX 30 Index increased by 0.84% and closed at 19,873.31 points on Wednesday, as the market gained LE 14 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index decreased by 0.21% and closed at 1,502.28 points on Wednesday. Bamburi Cement Limited and WPP Scangroup Plc were the top losers.

South Africa: JSE Top 40 Index decreased by 0.26% and closed at 64,882.30 points on Wednesday, as the Resources and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	25.80%
Exchange Rate (I&E window)	₦ 756.21
INTERBANK RATES	
OPR	2.30 ▲
Overnight	3.00 ▲

Other Emerging Markets

Abu Dhabi: ADX Index dropped by 1.55% to close at 9,823.84 points on Wednesday, as losses in the Utilities, Energy, and Real Estate pushed shares lower. MSCI UAE declined by 0.84% to close at 414.01 points.

Vietnam: VN-30 Index increased by 0.68% to close at 1,138.54 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam climbed by 1.77% to close at 655.31 points.

Saudi Arabia: Tadawul All Share Index declined by 1.02% to close at 10,840.27 points on Wednesday, as losses in the Energy, Materials, and Transportation sectors pushed shares lower. MSCI Saudi Arabia declined by 1.16% and closed at 1,390.84 points.

India: Nifty 50 Index decreased by 0.47% to close at 19,436.10 points on Wednesday, as losses in the Realty, Health Care, and Pharma sectors pushed shares lower. MSCI India declined by 0.73% to close at 2,199.38 points.

News

Nigeria:

Naira among Africa's worst currencies, falls by 40% –W'Bank
Govt loses N847bn to gas flaring – NOSDRA
Foreign investment inflow drops by \$18.6bn – Report

Kenya:

AA Kenya offers 11.4m shares in Sh229 million cash call
Treasury to save Sh130bn on spending cuts order
Inflation stays high despite improved food production

Abu Dhabi:

Abu Dhabi wealth fund's SPAC raises \$200mln in PIPE financing
Abu Dhabi Chamber signs four agreements during ADIPEC 2023
Abu Dhabi Regulator Imposes Fine of Over AED 1.78M on Fintech Company

Saudi Arabia:

Saudi Arabia, Portugal sign deal to boost cooperation in aviation sector
SADAFCO partners with NTSC to implement zero-emission vehicles
Saudi Arabia announces oil production cuts for November and December

Egypt:

Egypt BoP records \$882 mln surplus in FY22/23 on record tourism & Suez Canal revenues
Egypt's foreign reserves record \$34.97 bn in Sep: CBE
Egypt signs multi-bn-dollar deal with Maersk build huge green hydrogen facility in SCZone

South Africa:

Anglo American begins global head office job cuts in SA
MTN deploys over 20 000 battery backups on network
Mining accounts for nearly 60% of SA exports – PwC

India:

India, Japan to launch \$600 million climate fund
NPCI to sign pact with AI Etihad Payments of UAE on October 5
India's largest bank HDFC revamps top management after mega merger

Vietnam:

Budget revenue from taxes hits 76% of yearly estimate
Binh Phuoc reports nine-month trade surplus of nearly 1 billion USD
HNX raises nearly 792.79 million USD from G-bonds in September

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,823.84	-0.2%	0.4%	0.4%	-3.8%	AED/USD	3.67	0.0%	0.0%
Egypt	19,873.31	0.8%	-1.5%	-0.9%	36.1%	EGP/USD	30.80	-0.4%	24.7%
India	19,436.10	-0.5%	-1.0%	-1.0%	7.4%	INR/USD	83.45	0.3%	0.8%
Kenya	1,502.28	-0.2%	-0.4%	-0.4%	-10.4%	KES/USD	148.60	0.1%	20.3%
Nigeria	2,446.19	-0.4%	0.2%	0.2%	32.8%	NGN/USD	756.21	1.5%	39.0%
Saudi Arabia	10,840.27	-1.0%	-2.0%	-1.8%	3.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	64,882.30	-0.3%	-2.4%	-2.4%	-3.1%	ZAR/USD	19.33	0.1%	13.6%
Vietnam	1,138.54	0.7%	-2.4%	-2.4%	13.3%	VND/USD	24,435.00	0.2%	3.4%

MSCI Emerging Markets

MSCI Frontier	481.65	0.1%	-1.7%	-1.7%	2.0%	Brent Crude (\$)	85.81	-5.6%	-0.1%
MSCI Frontier 100	1,105.68	-0.1%	-1.7%	-1.7%	1.4%	Gold (\$)	1,834.80	-0.4%	0.5%
MSCI Emerging	927.86	-1.2%	-2.6%	-2.6%	-3.0%	Copper (\$)	7,949.50	-0.7%	-5.0%
MSCI World (USD)	2,810.86	0.4%	-1.5%	-1.5%	8.0%	Coffee (\$)	149.70	-0.1%	-4.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	17.20	5.2%	22.9%	25.55	Wema	4.23	-10.0%	8.5%	103.81
Guaranty	36.00	2.3%	56.5%	885.39	MTNN	250.00	-3.8%	16.3%	319.54
Dangote Sugar	55.00	1.6%	242.7%	258.03	Fidelity	8.10	-3.6%	86.2%	264.86
Transnational Corporation	6.08	1.5%	438.1%	35.17	Sterling	3.58	-2.7%	155.7%	4.65
Zenith	31.90	1.3%	32.9%	382.33	UACN	10.80	-0.5%	5.4%	10.74
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	5.98	5.98	0.0%	9.68	Cap	20.00	15.25	31.1%	0.21
Zenith	31.90	31.90	0.0%	382.33	Unilever	13.85	10.50	31.9%	0.55
Wema	4.23	4.23	0.0%	103.81	Nestle	1025.00	764.90	34.0%	71.59
UBA	16.70	16.70	0.0%	251.89	UBN	6.80	4.65	46.2%	0.65
UACN	10.80	10.80	0.0%	10.74	Nigerian Breweries	39.00	24.40	59.8%	6.12

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Bank of Sharjah	0.70	14.9%	45.8%	1.88	Abu Dhabi National Takaful Co.	7.35	-9.5%	14.1%	0.00
OOREDOO	10.60	11.0%	27.7%	0.00	FOODCO NATIONAL FOODSTUFF PrJSC	1.51	-7.4%	-40.1%	0.01
Fujairah Building Industries P.S.C	2.10	10.5%	7.1%	0.26	Gulf Cement Co.	0.38	-6.3%	-27.9%	0.22
National Marine Dredging Co.	24.56	7.7%	0.3%	25.51	Umm Al Qaiwain General Investment Co. P.S.C	1.17	-4.1%	-0.8%	0.02
Aram Group	3.65	2.5%	63.7%	0.63	Commercial Bank International	0.59	-3.3%	-30.5%	0.00
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
Bank of Sharjah	0.70	0.70	0.0%	1.88	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Al Buhaira National Insurance Company	2.90	2.90	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	0.0%	0.00
Union Insurance Company	0.68	0.68	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£)
Alexandria Mineral Oils Co.	9.06	5.8%	43.4%	17.30	Eastern Company	23.56	-2.2%	64.6%	39.78
Credit Agricole Egypt	14.95	5.2%	76.7%	6.66	Oriental Weavers	15.13	-1.6%	45.5%	5.36
Belton Financial Holding	2.92	4.7%	145.4%	155.65	Juhayna Food Industries	12.30	-1.3%	25.6%	1.12
Ezz Steel	51.10	4.1%	119.8%	17.32	Abu Dhabi Islamic Bank- Egypt	26.75	-1.0%	48.9%	33.80
Misr Fertilizers Production Co.	339.00	3.5%	138.1%	44.14	T M G Holding	12.90	-0.7%	13.9%	6.71
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	28.59	28.59	0.0%	6.71	Cairo For Investment And Real Estate Development	10.20	9.51	7.3%	0.52
T M G Holding	12.90	12.90	0.0%	37.30	Madinet Masr For Housing and Development	2.92	2.46	18.7%	13.93
Sidi Kerir Petrochemicals	25.73	25.73	0.0%	14.29	B Investments Holding	15.20	10.42	45.9%	4.21
Palm Hills Development Company	2.11	2.11	0.0%	24.60	E-finance For Digital and Financial Investments	17.90	11.25	59.1%	10.13
Oriental Weavers	15.13	15.13	0.0%	5.36	Fawry For Banking Technology And Electronic Payment	4.67	2.77	68.6%	38.30

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	2464.30	3.2%	-36.1%	7006.146	Axis Bank	991.90	-4.7%	6.2%	22841.22
Nestle India Limited	22992.35	3.0%	17.3%	4886.72	State Bank Of India	585.20	-2.9%	-4.6%	14709.59
Eicher Motors	3406.00	1.6%	5.5%	1918.08	NTPC	235.45	-2.4%	41.5%	5990.76
HUL	2508.75	1.6%	-2.0%	3958.72	Indusind Bank	1402.00	-2.3%	14.9%	5568.86
Hdfc Bank	1532.00	1.6%	-5.9%	41515.81	Bajaj Auto	4906.10	-2.2%	35.7%	1269.46
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Nestle India Limited	22992.35	23395.35	-1.7%	4886.72	UPL	603.95	576.95	4.7%	1157.00
Bajaj Finance	7865.00	8043.00	-2.2%	9311.11	HUL	2508.75	2393.00	4.8%	3958.72
Tata Consultancy Svs.	3545.00	3633.75	-2.4%	6267.33	Kotak Mahindra Bank	1727.00	1643.50	5.1%	10688.45
Bharti Airtel	923.05	948.70	-2.7%	5170.73	Reliance Industries	2314.10	2180.00	6.2%	11851.10
Coal India	288.00	297.50	-3.2%	1829.28	Hdfc Bank	1532.00	1384.00	10.7%	41515.81

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	6.46	8.0%	-4.7%	0.00	Bamburi Cement Limited	24.10	-3.6%	-23.5%	0.15
East African Breweries Limited	131.50	6.0%	-21.5%	0.08	WPP Scangroup Plc	2.61	-3.3%	-13.3%	0.01
Absa Bank Kenya	11.95	0.8%	-2.8%	0.69	Stanbic Holdings	117.25	-2.3%	15.0%	0.28
Equity Group Holdings Plc	36.05	0.1%	-19.0%	6.37	Kenya Reinsurance Corporation Ltd	1.72	-2.3%	-6.0%	6.99
					Kengen Limited	2.24	-1.8%	-30.4%	0.25
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)
Standard Chartered Bank Kenya Ltd	160.25	171.00	-6.3%	3.83	KCB Group Plc	20.95	20.85	0.5%	8.68
Absa Bank Kenya	11.95	12.95	-7.7%	0.69	Equity Group Holdings Plc	36.05	35.55	1.4%	6.37
Stanbic Holdings	117.25	129.75	-9.6%	0.28	WPP Scangroup Plc	2.61	2.57	1.6%	0.01
NCBA Group Plc	37.65	41.70	-9.7%	0.57	Bamburi Cement Limited	24.10	23.25	3.7%	0.15
Nation Media Group	20.00	23.90	-16.3%	2.12	Total Kenya Ltd	18.10	17.35	4.3%	0.01

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Alinma Tokio Marine Co.	15.80	4.0%	31.7%	101.73	Leejam Sports Co.	140.40	-5.9%	67.1%	41.26
National Agricultural Development Co.	49.00	3.6%	140.0%	21.95	Zamil Industrial Investment Co.	21.44	-4.2%	34.8%	3.60
Dar Alarkan Real Estate Development Co.	15.18	3.0%	30.2%	2155.43	National Medical Care Co.	123.00	-3.9%	66.4%	29.50
Astra Industrial Group	87.50	2.7%	69.25%	18.84	Elm Co.	755.00	-3.8%	127.4%	167.07
Wafrah for Industry and Development Co.	39.20	2.2%	53.1%	22.52	Arabian Internet and Communications Services Co.	319.20	-3.8%	31.5%	37.38
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)
Al Mawarid Manpower Co.	118.20	118.20	0.0%	12.93	Abdullah Al Othaim Markets Co.	12.90	12.90	0.0%	14.69
Saudi Aramco Base Oil Co.	141.80	141.80	0.0%	95.28	Abdulmohsen Alhokair Group for Tourism and Development	2.14	2.14	0.0%	3.20
Arabian Drilling Co.	185.60	185.60	0.0%	37.88	Advanced Petrochemical Co.	38.90	38.90	0.0%	19.20
Power & Water Utility Co for Jubail & Yanbu	59.10	59.10	0.0%	102.84	Al Rajhi REIT Fund	8.07	8.07	0.0%	3.47
Riyadh Cables Group Co.	71.30	71.30	0.0%	62.83	Alandalus Property Co.	22.50	22.50	0.0%	0.79

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MultiChoice Group	7288.00	3.2%	-37.8%	12025.20	Sasol Ltd	24280.00	-2.1%	-9.9%	34234.80
AngloGold Ashanti Ltd	29726.00	2.5%	-9.7%	48156.12	Glencore PLC	10345.00	-1.8%	-9.3%	13862.30
Remgro Ltd	15231.00	2.4%	14.5%	26958.87	Old Mutual Ltd	1194.00	-1.7%	14.1%	12632.52
Exxaro Resources Ltd	17103.00	1.5%	-21.3%	7083.38	Impala Platinum Holdings Ltd	8760.00	-1.6%	-58.9%	32499.60
MTN Group Ltd	11106.00	1.4%	-12.8%	41536.44	FirstRand Ltd	6227.00	-1.6%	0.2%	92097.33
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)
Remgro Ltd	15231.00	15292.00	-0.4%	26958.87	Nedbank Group Ltd	19545.00	19400.00	0.7%	25017.60
Aspen Pharmacare Holdings Ltd	17079.00	17154.00	-0.4%	7211.95	Sasol Ltd	24280.00	23881.00	1.7%	34234.80
Reinet Investments SCA	41181.00	41681.00	-1.2%	10510.63	Anglo American PLC	50832.00	49923.00	1.8%	47019.60
Anheuser-Busch InBev SA/NV	102431.00	104799.00	-2.3%	15713.94	Growthpoint Properties Ltd	1044.00	1024.00	2.0%	14135.76
Bid Corp Ltd	41499.00	42563.00	-2.5%	21318.45	Mondi PLC	31679.00	31000.00	2.2%	18866.75

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Securities Inc	31750.00	5.1%	79.4%	1052030.26	Southeast Asia Commercial JS Bank	24450.00	-1.8%	-10.6%	26329.09
Vingroup JSC	46100.00	3.6%	-14.3%	305227.30	Vietjet Aviation	96800.00	-1.1%	-11.6%	87083.81
Sai Gon Thuong Tin Commercial	30200.00	3.4%	34.2%	608431.57	Techcombank	32250.00	-0.8%	24.8%	90366.16
Vincom Retail	27000.00	2.7%	2.7%	62355.49	Masan Group Corp	73500.00	-0.7%	-21.0%	107055.82
Vietnam Rubber Group JSC	19500.00	2.6%	41.3%	39629.12	Tien Phong Commercial Joint Stock Bank	16600.00	-0.6%	-21.1%	59204.98
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	92500.00	97944.43	-5.6%	147146.95	BaoViet Holdings	42050.00	42050.00	0.0%	15890.24
Vietcombank	86300.00	96000.00	-10.1%	79225.17	Petrovietnam Gas	85800.00	85800.00	0.0%	51973.21
Vinamilk	74400.00	87004.15	-14.5%	79797.07	Masan Group Corp	73500.00	73500.00	0.0%	107055.82
Bank for Inv. and Devp	42500.00	49950.00	-14.9%	37689.82	Mobile World Inv. Corp	49200.00	49200.00	0.0%	237453.70
Sai Gon Thuong Tin Commercial	30200.00	36700.00	-17.7%	608431.57	Saigon Beer Alcohol Beverage Corp.	70000.00	70000.00	0.0%	23417.68

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