

Daily Market Report

30 October 2023

JSE

JSE All-Share Index declined by 0.68% and closed at 69,451.97 points on Friday, as the Financial and Industrial sectors recorded losses.

BRVM

BRVM Composite Index was down 0.18% and closed at 209.20 points on Friday, with Sogb Côte d'Ivoire and Setao Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index inched up by 0.08% to close at 67,136.58 on Friday, as the Oil & Gas, Insurance, and Banking sectors recorded gains.

EGX

EGX 30 Index declined by 0.75% and closed at 23,086.72 points on Sunday, as the market lost LE 16 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index decreased by 0.39% to close at 883.43 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▼	0.68%
BRVM Bourse Régionale des Valeurs Mobilières	▼	0.18%
NGX Nigerian Stock Exchange	▲	0.08%
EGX Egyptian Stock Exchange	▼	0.75%
ESG Casablanca Stock Exchange	▼	0.39%

African Markets

Nigeria: NGX 30 Index inched down by 0.03% to close at 2,469.29 points on Friday. Nigerian Breweries and Flour Mills were the top losers.

Egypt: EGX 30 Index declined by 0.75% and closed at 23,086.72 points on Sunday, as the market lost LE 16 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index inched down by 0.02% and closed at 1,461.99 points on Friday. Nairobi Securities Exchange Plc and East African Breweries Limited were the top losers.

South Africa: JSE Top 40 Index declined by 0.75% and closed at 63,785.89 points on Friday, as the Financial and Industrial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	26.72%
Exchange Rate (I&E window)	₦ 789.94
INTERBANK RATES	
OPR	14.40 ▲
Overnight	14.75 ▲

Other Emerging Markets

Abu Dhabi: ADX Index declined marginally by 0.06% to close at 9,236.85 points on Friday, as losses in the Health Care, Financial, and Real Estate pushed shares lower. MSCI UAE declined by 0.63% to close at 360.49 points.

Vietnam: VN-30 Index increased by 0.25% to close at 1,067.57 points on Friday, as blue-chip companies recorded gains. MSCI Vietnam was up by 0.13% to close at 604.20 points.

Saudi Arabia: Tadawul All Share Index increased by 0.71% to close at 10,482.85 points on Sunday, as gains in the Media and Entertainment, Software & Services, and Telecommunication Services sectors led shares higher. MSCI Saudi Arabia increased by 0.93% and closed at 1,349.40 points.

India: Nifty 50 Index increased by 1.01% to close at 19,047.25 points on Friday, as gains in the Media, Realty, and PSU bank sectors led shares higher. MSCI India climbed by 1.23% to close at 2,157.23 points.

News

Nigeria:

Nigerians spend \$340.84m forex on education in six months – CBN
Dangote Cement earns N933bn from Nigerian operations
Edo refineries to boost Nigeria's capacity, says Wabote

Kenya:

NCBA Bank subsidiary in Sh500m solar project bid
CBK reveals Sh109bn banks' exposure to larger borrowers
Joe Biden pledges to make Nairobi investment magnet in Africa

Abu Dhabi:

Daffodil Computers to invest \$50,000 in Dubai
Barclays enlist First Abu Dhabi Bank to back £1bn Telegraph bid
Abu Dhabi airport's Q3 2023 traffic climbs 29% to 5.9mIn

Saudi Arabia:

Saudi exports of refined oil products rose 16% in August: report
Saudi fund seals \$100m loan deal to propel Argentina's water sector
Deals worth \$800m signed at largest-ever Saudi Agriculture exhibition

Egypt:

ACWA Power signs agreements worth \$746m at FI17 in Riyadh
SCZONE signs contracts worth \$3.57bn for 60 projects in Egypt
Egypt, Turkey discuss cooperation in healthcare sector

South Africa:

Sanofi loses \$21bn in market value after scrapping profit target
AngloGold will pay Sars R4.5bn to walk away from SA
Floating tankers line up off SA to ensure diesel power

India:

IRB Infrastructure Trust gets LoA for Rs 4,428 crore project from NHAI
Apple India's revenue booms; nears Rs 50,000 crore milestone with record growth
IDFC First Bank posts 35% quarter 2 profit

Vietnam:

October CPI increases 0.08%: GSO
Vietnam looks to develop, maximise modern seaports
Hanoi: Newly-established enterprises up 6% in 10 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,236.85	-0.1%	0.0%	-5.6%	-9.5%	AED/USD	3.67	0.0%	0.0%
Egypt	23,086.72	-0.8%	-0.8%	15.1%	58.1%	EGP/USD	30.86	-0.1%	24.9%
India	19,047.15	1.0%	0.0%	-3.0%	5.2%	INR/USD	83.41	0.2%	0.8%
Kenya	1,461.99	-0.02%	0.0%	-3.1%	-12.8%	KES/USD	150.50	0.1%	21.9%
Nigeria	2,469.29	-0.03%	0.0%	1.1%	34.0%	NGN/USD	789.94	-6.0%	41.6%
Saudi Arabia	10,482.85	0.7%	0.7%	-5.0%	0.04%	SAR/USD	3.75	0.0%	-0.2%
South Africa	63,785.89	-0.7%	0.0%	-4.1%	-4.7%	ZAR/USD	18.85	-0.5%	10.7%
Vietnam	1,067.57	0.2%	0.0%	-8.5%	6.2%	VND/USD	24,580.00	-0.1%	4.0%

MSCI Emerging Markets

MSCI Frontier	466.84	0.1%	0.0%	-4.8%	-1.2%	Brent Crude (\$)	90.48	2.9%	5.3%
MSCI Frontier 100	1,068.27	0.1%	0.0%	-5.0%	-2.1%	Gold (\$)	1,998.50	0.1%	9.4%
MSCI Emerging	919.78	1.0%	0.0%	-3.5%	-3.8%	Copper (\$)	8,099.00	1.4%	-3.3%
MSCI World (USD)	2,731.99	-0.3%	0.0%	-4.2%	5.0%	Coffee (\$)	155.16	-0.7%	-0.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	13.10	7.4%	27.8%	30.77	Nigerian Breweries	36.05	-5.1%	-12.1%	16.73
Sepplat Petroleum	1905.00	3.7%	73.2%	1109.79	Cap	20.20	-4.7%	13.5%	4.52
Fidelity	8.25	1.9%	89.7%	137.63	Flour Mills	29.00	-3.3%	2.1%	128.76
Nascon	58.00	1.8%	422.5%	244.05	Sterling	3.51	-2.5%	150.7%	11.58
United Capital PLC	16.40	1.2%	17.1%	10.89	Transnational Corporation	6.22	-2.0%	450.4%	150.63
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	5.90	5.90	0.0%	5.14	Cap	20.20	15.25	32.5%	4.52
Zenith	33.30	33.30	0.0%	216.14	Unilever	14.35	10.50	36.7%	3.89
Wema	4.78	4.78	0.0%	3.61	Nestle	1050.00	764.90	37.3%	9.91
UBA	19.00	19.00	0.0%	293.04	UBN	6.80	4.65	46.2%	0.16
UACN	13.10	13.10	0.0%	30.77	Nigerian Breweries	36.05	24.40	47.7%	16.73

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Co. for White Cement & Construction Materials	1.20	8.1%	-33.0%	0.00	Sudatel Telecom Group Co Ltd	0.30	-2.6%	-34.8%	0.18
Waha Capital Company	1.70	7.6%	25.0%	26.96	Hayah Insurance Co	1.15	-2.5%	18.6%	0.06
Aram Group	3.00	6.4%	34.5%	0.00	First Abu Dhabi Bank	12.44	-2.5%	-27.3%	53.72
Abu Dhabi National Co. for Building Materials	0.27	6.3%	47.5%	0.00	APEX INVESTMENT	1.75	-2.2%	-50.0%	1.14
The National Bank of Ras Al Khaimah	5.50	3.6%	17.0%	3.11	Americana Restaurants International PLC	3.68	-1.9%	23.9%	16.33
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	Abu Dhabi National Hotels Co.	0.99	0.99	0.0%	0.00
Al Buhaira National Insurance Company	2.90	2.90	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Gulf Investment House Company	4.50	4.50	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
Sawaeed Holding P.J.S.C	6.78	6.78	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	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£)
Belton Financial Holding	3.52	15.8%	195.8%	1185.77	Abou Kir Fertilizers	86.00	-6.5%	121.7%	94.39
GB AUTO	6.44	7.7%	20.1%	108.63	T M G Holding	23.85	-5.5%	138.7%	172.69
Heliopolis Housing	12.65	6.5%	58.9%	298.28	Misr Fertilizers Production Co.	570.11	-5.0%	300.4%	158.55
Palm Hills Development Company	2.56	4.9%	30.6%	152.85	ELSWEDY ELECTRIC	28.50	-4.9%	137.5%	74.12
Telecom Egypt	33.04	2.5%	31.6%	97.72	Sidi Kerir Petrochemicals	29.81	-4.6%	138.7%	172.69
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	33.04	33.04	0.0%	97.72	Alexandria Containers and goods	37.61	29.50	27.5%	17.28
T M G Holding	23.85	23.85	0.0%	172.69	Madinet Masr For Housing and Development	3.40	2.46	38.2%	90.73
Sidi Kerir Petrochemicals - SIDPEC	29.81	29.81	0.0%	27.50	B Investments Holding	16.68	10.42	60.1%	8.70
Palm Hills Development Company	2.56	2.56	0.0%	152.85	E-finance For Digital and Financial Investments	18.44	11.25	63.9%	5.47
Oriental Weavers	19.13	19.13	0.0%	12.27	EFG Holding	17.31	8.96	93.2%	224.04

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Coal India	314.75	3.1%	39.9%	0.00	UPL	558.80	-0.4%	-22.0%	0.00
Hcl Technologies	1267.50	2.9%	22.0%	0.00	ITC	433.90	-0.1%	30.9%	0.00
Axis Bank	999.90	2.9%	7.1%	0.00	Hindalco Industries	456.40	-0.1%	-3.6%	0.00
State Bank Of India	561.70	2.7%	-8.5%	0.00					
Bajaj Auto	5396.50	2.6%	49.2%	0.00					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Auto	5396.50	5510.00	-2.1%	0.00	UPL	558.80	556.30	0.4%	0.00
Indusind Bank	1438.00	1475.65	-2.6%	0.00	Hdfc Bank	1472.55	1447.40	1.7%	0.00
Nestle India Limited	24050.00	24745.00	-2.8%	0.00	HUL	2478.00	2393.00	3.6%	0.00
Maruti Suzuki India	10535.00	10845.00	-2.9%	0.00	Kotak Mahindra Bank	1705.00	1643.50	3.7%	0.00
Hcl Technologies	1267.50	1311.30	-3.3%	0.00	Reliance Industries	2266.15	2180.00	4.0%	0.00

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	2.29	7.0%	-28.9%	3.93	Nairobi Securities Exchange Plc	5.92	-5.1%	-12.7%	0.10
Centum Investment Company Plc	8.74	2.8%	4.5%	0.18	East African Breweries Limited	128.50	-2.3%	-23.3%	2.17
Kenya Reinsurance Corporation Ltd	1.75	2.3%	-4.4%	0.09	Diamond Trust Bank Limited	45.00	-1.9%	-10.0%	2.79
Kenya Power & Lighting Limited	1.49	1.4%	-4.5%	1.96	KCB Group Plc	18.85	-1.6%	-50.5%	5.76
Equity Group Holdings Plc	38.00	1.3%	-14.6%	78.74	Total Kenya Ltd	17.10	-1.4%	-28.3%	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	39.00	41.70	-6.5%	0.37	KCB Group Plc	18.85	18.85	0.0%	5.76
Absa Bank Kenya	11.85	12.95	-8.5%	0.52	Safaricom Plc	12.50	12.45	0.4%	901.40
Standard Chartered Bank Kenya Ltd	156.00	171.00	-8.8%	1.75	Bamburi Cement Limited	23.10	22.95	0.7%	0.01
The Cooperative Bank of Kenya Ltd	11.80	14.00	-15.7%	1.91	Diamond Trust Bank Limited	45.00	44.00	2.3%	2.79
Stanbic Holdings	109.00	129.75	-16.0%	0.28	WPP Scangroup Plc	2.54	2.43	4.5%	0.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Fisheries Co.	23.50	9.2%	-12.6%	33.90	Saudi Arabian Amiantit Co.	37.85	-6.3%	16.5%	21.11
Al-Baha Investment and Development Co.	0.14	7.7%	-98.8%	0.80	National Agricultural Marketing Co.	13.98	-3.3%	-18.7%	10.96
Dr. Sulaiman Al Habib Medical Services Group	239.60	6.4%	8.6%	86.46	Saudi Automotive Services Co.	56.30	-2.6%	73.2%	13.14
Al Hammadi Company for Development and Investment	54.20	5.2%	35.2%	34.48	National Medical Care Co.	125.00	-2.3%	69.1%	26.29
Zamil Industrial Investment Co.	20.20	4.6%	27.0%	5.99	Amlak International for Real Estate Finance Co	12.40	-2.2%	-17.0%	0.68
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)
Al Mawarid Manpower Co.	104.00	104.00	0.0%	18.29	Abdullah Al Othaim Markets Co.	12.92	12.92	0.0%	5.36
Arabian Drilling Co.	172.60	172.60	0.0%	16.64	Abdulmohsen Alhokair Group for Tourism and Development	1.99	1.99	0.0%	1.57
Alinma Hospitality REIT Fund	0.00	0.00	0.0%	0.00	Advanced Petrochemical Co.	37.75	37.75	0.0%	8.55
Retal Urban Development Co.	0.00	0.00	0.0%	0.00	Alandalus Property Co.	0.00	0.00	0.0%	0.00
Aldawaa Medical Services Co.	92.20	92.20	0.0%	6.99	Al-Babtain Power and Telecommunication Co.	18.04	18.04	0.0%	1.70

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	7500.00	2.8%	-64.8%	25125.00	Sanlam Ltd	6447.00	-3.1%	32.3%	28947.03
Exxaro Resources Ltd	19335.00	1.2%	-11.0%	12253.56	British American Tobacco PLC	54894.00	-2.8%	-18.6%	52505.56
MTN Group Ltd	10112.00	1.1%	-20.6%	80693.76	MultiChoice Group	7243.00	-2.5%	-41.3%	4225.42
Clicks Group Ltd	26456.00	1.1%	-2.0%	59261.44	Discovery Ltd	12706.00	-2.3%	-27.9%	14738.96
Mondi PLC	29792.00	1.0%	2.4%	19096.97	Gold Fields Ltd	25484.00	-2.1%	44.7%	49184.12
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)
Aspen Pharmacare Holdings Ltd	16702.00	16853.00	-0.9%	15863.56	Anglo American PLC	47811.00	47744.00	0.1%	40031.67
Rengro Ltd	14297.00	14515.00	-1.5%	13540.69	Nedbank Group Ltd	19649.00	19572.00	0.4%	18939.08
Bid Corp Ltd	39781.00	40700.00	-2.3%	37634.82	Growthpoint Properties Ltd	931.00	919.00	1.3%	12186.79
Anheuser-Busch InBev SA/NV	100358.00	103401.00	-2.9%	10136.16	Mondi PLC	29792.00	29298.00	1.7%	19096.97
Reinet Investments SCA	37200.00	38593.00	-3.6%	7322.08	Sasol Ltd	24846.00	24402.00	1.8%	29566.74

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	18100.00	4.3%	-4.7%	44.405,70	Vincom Retail	22900.00	-6.9%	-12.9%	300.298,15
Bank for Inv. and Devp	42000.00	3.6%	8.8%	36.555,88	Vinhomes	39200.00	-6.2%	-18.3%	717.020,81
Petrovietnam Gas	77600.00	2.8%	-23.5%	29.064,82	Masan Group Corp	57800.00	-5.9%	-37.8%	253.637,42
Saigon Securities Inc	29450.00	2.6%	66.4%	584.542,54	Investment & Industrial Development JS Corp.	59000.00	-1.0%	-26.8%	12.377,19
Saigon-Hanoi Commercial Bank	10300.00	2.5%	22.2%	118.133,92	Techcombank	29550.00	-0.8%	14.3%	114.923,67
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	87000.00	97944.43	-11.2%	177.066,40	BaoViet Holdings	39500.00	39500.00	0.0%	18.101,61
Vietcombank	85000.00	96000.00	-11.5%	65.190,27	Petrovietnam Gas	77600.00	77600.00	0.0%	29.064,82
Bank for Inv. and Devp	42000.00	49950.00	-15.9%	36.555,88	Masan Group Corp	57800.00	57800.00	0.0%	253.637,42
Southeast Asia Commercial JS Bank	25550.00	31300.00	-18.4%	30.444,91	Mobile World Inv. Corp	42000.00	42000.00	0.0%	197.345,62
Sai Gon Thuong Tin Commercial	28700.00	36700.00	-21.8%	482.601,18	Saigon Beer Alcohol Beverage Corp.	63100.00	63100.00	0.0%	63.119,98

Email: research@fsdhgroup.com • www.fsdhgroup.com

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