

Daily Market Report

6 November 2023

JSE

JSE All-Share Index surged by 2.06% and closed at 72,856.18 points on Friday, as the Resource and Industrial sectors recorded gains.

BRVM

BRVM Composite Index climbed by 1.78% and closed at 209.62 points on Friday, with Bank of Africa - Senegal and Orange Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index increased by 0.22% to close at 70,196.77 on Friday, as the Consumer Goods sector recorded gains.

EGX

EGX 30 Index surged by 2.01% and closed at 23,094.69 points on Sunday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index inched down by 0.05% to close at 882.19 points on Friday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	2.06 %
BRVM Bourse Régionale des Valeurs Mobilières	▲	1.78%
NGX Nigerian Stock Exchange	▲	0.22%
EGX Egyptian Stock Exchange	▲	2.01%
ESG Casablanca Stock Exchange	▼	0.05%

African Markets

Nigeria: NGX 30 Index increased by 0.22% to close at 2,580.78 points on Friday. International Breweries and Airtel Africa were the top gainers.

Egypt: EGX 30 Index surged by 2.01% and closed at 23,094.69 points on Sunday, as the market gained LE 22 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index inched down by 0.05% and closed at 1,443.42 points on Friday. Nairobi Securities Exchange Plc and NCBA Group Plc were the top losers.

South Africa: JSE Top 40 Index surged by 2.26% and closed at 66,916.23 points on Friday, as the Resource and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	26.72%
Exchange Rate (I&E window)	₦ 776.14
INTERBANK RATES	
OPR	16.17 ▼
Overnight	16.69 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.25% to close at 9,510.49 points on Friday, as gains in the Telecommunications, Health Care, and Industrial led shares higher. MSCI UAE increased by 0.81% to close at 387.32 points.

Vietnam: VN-30 Index was down by 0.12% to close at 1,086.19 points on Friday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.32% to close at 620.25 points.

Saudi Arabia: Tadawul All Share Index increased by 0.79% to close at 10,938.95 points on Sunday, as gains in the Energy, Transportation, and Banks sectors led shares higher. MSCI Saudi Arabia increased by 0.71% and closed at 1,418.40 points.

India: Nifty 50 Index increased by 0.51% to close at 19,230.60 points on Friday, as gains in the Media, Consumer Durables, and Realty sectors led shares higher. MSCI India increased by 0.64% to close at 2,185.31 points.

News

Nigeria:

Dangote repatriates \$688m from African operations
SMEDAN, Anambra sign N1bn pact to boost SMEs growth
FG policies, listings drive N1.7tn October's gain on NGX

Kenya:

CBK Accepts Bids Worth KSh 23.7 Billion at Weekly T-Bills Auction
SMEP Microfinance Sells 51% Stake to US Organization
KCB Tanzania receives Sh3.2bn in EIB funding

Abu Dhabi:

Fintech: Dubai Launches \$136m VC Fund for Financial Technology Startups
Abu Dhabi plans \$50 billion investment in fast-growing India
Abu Dhabi Real Estate Centre launched to boost property sales in the emirate

Saudi Arabia:

Saudi Arabia's R&D investment hits \$5.1bn in 2022
Taif business forum attracts \$2.9bn in investment agreements
Saudi healthcare set for technological boost as ministry signs MoU

Egypt:

Egypt's int'l reserves increased to \$35.1B in October, CBE
Egypt's non-oil activity declines to 47.9 in October: S&P PMI Report
ACUD, Schneider Electric discuss cooperation, investment in NAC

South Africa:

Skype, Flutterwave founders back \$205m African tech fund
Standard Bank lauds SA budget cuts
Eskom 'plan' sees no coal shutdown until 2028

India:

India's power consumption grows 9.4 pc to 984.39 billion units in April-October
Bank of Baroda Q2 net profit surges 28% to 4,253 crore
SBI Q2 net profit rises 8% to 14,430 crore

Vietnam:

Industrial production index up 0.5% in ten months
State budget collection down over 9% in 10 months
Ten-month public investment disbursement fulfills 52.1% of plan

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,510.49	0.3%	0.0%	1.8%	-6.9%	AED/USD	3.67	0.0%	0.0%
Egypt	23,094.69	2.0%	2.0%	2.4%	58.2%	EGP/USD	30.65	-0.8%	24.1%
India	19,230.60	0.5%	0.0%	0.8%	6.2%	INR/USD	83.16	-0.1%	0.5%
Kenya	1,443.42	-0.05%	0.0%	-1.2%	-13.9%	KES/USD	148.78	-1.4%	20.5%
Nigeria	2,580.78	0.2%	0.0%	1.3%	40.1%	NGN/USD	776.14	-2.2%	40.5%
Saudi Arabia	10,938.95	0.8%	0.8%	2.3%	4.4%	SAR/USD	3.75	0.0%	-0.2%
South Africa	66,916.23	2.3%	0.0%	4.8%	-0.1%	ZAR/USD	18.21	-1.1%	7.0%
Vietnam	1,086.19	-0.1%	0.0%	4.5%	8.1%	VND/USD	24,535.00	-0.2%	3.8%

MSCI Emerging Markets

MSCI Frontier	473.16	0.5%	0.0%	2.7%	0.2%	Brent Crude (\$)	84.89	-2.3%	-1.2%
MSCI Frontier 100	1,081.67	0.1%	0.0%	2.9%	-0.8%	Gold (\$)	1,999.20	0.3%	9.5%
MSCI Emerging	948.26	1.9%	0.0%	3.6%	-0.8%	Copper (\$)	8,175.50	0.4%	-2.3%
MSCI World (USD)	2,795.62	-2.0%	0.0%	1.0%	7.4%	Coffee (\$)	155.03	1.1%	-0.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
International Breweries	4.55	9.6%	-3.2%	5.19	BUA Cement	100.50	-4.3%	2.8%	135.20
Airtel Africa	1790.00	5.7%	9.5%	2221.71	Custodian	7.00	-2.8%	17.6%	32.34
Cadbury	15.75	5.0%	32.4%	3.81	MTNN	234.00	-2.5%	8.8%	2059.98
Flour Mills	32.50	4.8%	14.4%	438.87	UBA	20.45	-2.4%	169.1%	636.50
Lafarge Africa	28.80	2.9%	20.0%	26.05	Sterling	3.41	-2.0%	143.6%	12.22
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	6.30	6.30	0.0%	22.55	Cap	20.00	15.25	31.1%	0.36
Zenith	34.00	34.00	0.0%	277.50	Unilever	13.80	10.50	31.4%	3.89
Wema	4.90	4.90	0.0%	33.07	Nestle	1050.00	764.90	37.3%	79.14
UBA	20.45	20.45	0.0%	636.50	UBN	6.80	4.65	46.2%	1.23
UACN	16.00	16.00	0.0%	69.33	Nigerian Breweries	37.25	24.40	52.7%	214.44

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
ADNOC Logistics & Services plc	3.59	4.7%	0.0%	22.01	Gulf Cement Co.	0.35	-5.6%	-32.3%	0.00
OOREDOO	9.98	4.6%	20.2%	0.01	Americana Restaurants	3.45	-3.6%	16.2%	76.55
Easy Lease Motorcycle Rental PJSC	31.94	2.9%	-8.2%	8.39	ESG EMIRATES STALLIONS GROUP	5.85	-2.5%	-24.6%	13.43
Arkan Building Materials Company	1.42	2.9%	-10.7%	12.94	ESHRAQ INVESTMENTS	0.45	-1.8%	-8.2%	1.20
Gulf Pharmaceutical Industries	0.84	2.7%	-28.0%	0.45	Al Seer Marine Supplies & Equipment Co.	7.86	-1.6%	-16.6%	9.73
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	2.90	2.90	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
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Sharjah Insurance Company	1.49	1.49	0.0%	0.00
Sawaheed Holding P.J.S.C	6.78	6.78	0.0%	0.00	National Bank of Fujairah	4.50	4.50	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	3.85	8.8%	223.5%	789.91	Misr Fertilizers Production Company	519.10	-1.6%	264.6%	186.68
QALA For Financial Investments	2.54	5.0%	22.1%	102.08	Oriental Weavers	18.73	-0.9%	80.1%	6.06
EFG Holding	17.83	4.9%	24.7%	159.29	Alexandria Mineral Oils Company	11.20	-0.7%	77.2%	87.01
Abu Dhabi Islamic Bank- Egypt	34.50	4.0%	92.0%	11.98	Heliopolis Housing	11.75	-0.4%	47.6%	96.55
Edita Food Industries S.A.E	27.54	3.9%	98.3%	0.58					
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	34.30	34.30	0.0%	23.69	Alexandria Containers and goods	36.51	29.50	23.8%	5.60
T M G Holding	22.94	22.94	0.0%	78.76	Madinet Masr For Housing and Development	3.33	2.46	35.4%	32.72
Sidi Kerir Petrochemicals - SIDPEC	28.97	28.97	0.0%	17.55	E-finance For Digital and Financial Investments	18.37	11.25	63.3%	58.76
QALA For Financial Investments	2.54	2.54	0.0%	102.08	B Investments Holding	17.19	10.42	65.0%	10.79
Palm Hills Development Company	2.64	2.64	0.0%	52.44	Fawry For Banking Technology And Electronic Payment	5.35	2.77	93.1%	23.54

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Apollo Hospitals Enterprise Ltd	5148.00	5.3%	15.0%	0.00	Bajaj Finserv	1531.05	-2.8%	-1.1%	0.00
Adani Ports And Sez.	795.00	2.7%	-2.8%	0.00	SBI Life Insurance	1326.10	-1.3%	7.7%	0.00
Eicher Motors	3426.00	2.6%	6.1%	0.00	Dr Reddys Lab	5272.00	-1.3%	24.4%	0.00
Titan Company	3277.00	2.4%	26.2%	0.00	Indusind Bank	1449.00	-0.8%	18.8%	0.00
LTIMINDTREE LIMITED	5125.00	2.1%	17.4%	0.00	Bajaj Finance	7403.00	-0.6%	12.6%	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 ₹)
Tata Consumer products Ltd.	913.00	928.00	-1.6%	0.00	Hdfc Bank	1484.50	1460.25	1.7%	0.00
Indusind Bank	1449.00	1479.95	-2.1%	0.00	UPL	550.00	528.15	4.1%	0.00
Titan Company	3277.00	3352.00	-2.2%	0.00	HUL	2508.55	2393.00	4.8%	0.00
Power Grid Corp Of India	204.25	209.00	-2.3%	0.00	Kotak Mahindra Bank	1733.00	1643.50	5.4%	0.00
Sun Pharma Industries	1141.80	1169.70	-2.4%	0.00	Reliance Industries	2319.00	2180.00	6.4%	0.00

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	126.00	2.4%	-24.8%	0.19	Nairobi Securities Exchange Plc	5.84	-6.7%	-13.9%	0.03
Kenya Power & Lighting Limited	1.41	2.2%	-9.6%	0.16	NCBA Group Plc	37.15	-5.0%	-5.6%	0.15
Centum Investment Company Plc	8.50	1.2%	1.7%	0.37	Safaricom Plc	11.65	-3.7%	-51.8%	68.60
Diamond Trust Bank Limited	44.95	0.9%	-10.1%	0.22	Kengen Limited	2.29	-3.4%	-28.9%	2.46
Absa Bank Kenya	11.45	0.4%	-6.9%	0.46	Bamburi Cement Limited	22.95	-2.3%	-27.1%	0.06
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	155.75	171.00	-8.9%	2.71	KCB Group Plc	16.35	16.35	0.0%	16.94
NCBA Group Plc	37.15	41.70	-10.9%	0.15	Safaricom Plc	11.65	11.65	0.0%	68.60
Absa Bank Kenya	11.45	12.95	-11.6%	0.46	Bamburi Cement Ltd	22.95	22.90	0.2%	0.06
Nation Media Group	20.00	23.90	-16.3%	0.01	WPP Scangroup Plc	2.46	2.43	1.2%	0.02
The Cooperative Bank of Kenya Ltd	11.35	14.00	-18.9%	2.85	Diamond Trust Bank Limited	44.95	44.00	2.2%	0.22

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Medical Care Co.	136.40	10.0%	84.6%	64.30	Al-Etihad Cooperative Insurance Co.	18.56	-8.0%	22.8%	33.93
Al-Baha Investment and Development Co.	0.14	7.7%	-98.8%	1.27	Gulf Insurance Group	28.30	-5.5%	15.0%	11.13
United Wire Factories Co.	26.50	7.6%	10.4%	8.56	National Agricultural Marketing Co.	12.98	-5.0%	-24.5%	15.45
Wataniya Insurance Co.	17.00	7.5%	25.6%	14.48	The Company for Cooperative Insurance	123.00	-3.9%	52.8%	65.06
United International Transportation Co.	70.00	5.4%	53.3%	25.16	Buruj Cooperative Insurance Co.	18.60	-3.1%	18.2%	6.12
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.	114.00	114.00	0.0%	42.90	Abdullah Al Othaim Markets Co.	13.26	13.26	0.0%	6.77
Arabian Drilling Co.	179.00	179.00	0.0%	25.82	Abdulmohsen Alhokair Group for Tourism and Development	2.00	2.00	0.0%	2.04
Alinma Hospitality REIT Fund	0.00	0.00	0.0%	0.00	Advanced Petrochemical Co.	37.70	37.70	0.0%	10.51
Retal Urban Development Co.	0.00	0.00	0.0%	0.00	AlAhli REIT Fund 1	7.78	7.78	0.0%	2.27
Aldawaa Medical Services Co.	99.50	99.50	0.0%	13.05	Alandalus Property Co.	0.00	0.00	0.0%	0.00

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sibanye Stillwater Ltd	2444.00	6.9%	-45.3%	30794.40	Clicks Group Ltd	28706.00	-1.5%	6.3%	41049.58
AngloGold Ashanti Ltd	33598.00	6.2%	2.1%	64508.16	Glencore PLC	9925.00	-1.1%	-13.0%	31660.75
Capitec Bank Holdings Ltd	185496.00	5.6%	-0.2%	88155.12	BHP Group Ltd	53990.00	-0.8%	100.4%	19723.63
Naspers Ltd	317548.00	5.6%	12.4%	219397.09	Sasol Ltd	23200.00	-0.7%	2118.0%	39440.00
Gold Fields Ltd	24872.00	4.8%	41.2%	48997.84	Old Mutual Ltd	1243.00	-0.2%	18.8%	11037.84
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	14541.00	14599.00	-0.4%	20648.22	Sasol Ltd	23200.00	23200.00	0.0%	39440.00
Anheuser-Busch InBev SA/NV	107676.00	108491.00	-0.8%	14877.59	Mondi PLC	30296.00	30144.00	0.5%	33022.64
Bid Corp Ltd	40590.00	40911.00	-0.8%	21505.80	Growthpoint Properties Ltd	1056.00	1040.00	1.5%	24288.00
Aspen Pharmacare Holdings Ltd	18050.00	18262.00	-1.2%	30504.50	Anglo American PLC	49656.00	48545.00	2.3%	64056.24
Reinet Investments SCA	41200.00	41799.00	-1.4%	16091.07	Nedbank Group Ltd	21253.00	20423.00	4.1%	26778.78

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers*	Last Price	1d%	YTD%	Val (mn đ)
Techcombank	31000.00	5.6%	19.9%	245.565,06	Southeast Asia Commercial JS Bank	24300.00	-6.4%	-11.2%	50.642,58
Mobile World Inv. Corp	38950.00	5.3%	-9.2%	474.803,31	Vietnam Prosperity	19800.00	-2.5%	10.6%	270.908,02
Vincom Retail	24400.00	5.0%	-7.2%	301.810,54	FPT Corp	87000.00	-2.3%	13.1%	423.054,31
Ho Chi Minh City Devp	18350.00	4.3%	15.0%	283.474,24	Saigon-Hanoi Commercial Bank	10700.00	-1.8%	26.9%	151.847,20
Saigon Beer Alcohol Beverage Corp.	63900.00	4.1%	-61.7%	47.253,82	Sai Gon Thuong Tin Commercial	28500.00	-1.7%	26.7%	540.989,52
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)
Vietcombank	88900.00	96000.00	-7.4%	96.662,38	BaoViet Holdings	40400.00	40400.00	0.0%	7.955,90
FPT Corp	87000.00	97944.43	-11.2%	423.054,31	Petrovietnam Gas	79100.00	79100.00	0.0%	35.904,38
Bank for Inv. and Devp	41500.00	49950.00	-16.9%	23.529,06	Masan Group Corp	63900.00	63900.00	0.0%	102.108,91
Vinamilk	70000.00	87004.15	-19.5%	118.712,87	Mobile World Inv. Corp	38950.00	38950.00	0.0%	474.803,31
Saigon-Hanoi Commercial Bank	10700.00	13600.00	-21.3%	151.847,20	Saigon Beer Alcohol Beverage Corp.	63900.00	63900.00	0.0%	47.253,82

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