

# Daily Market Report

## 10 November 2023

### JSE

JSE All-Share Index decreased by 0.33% and closed at 72,226.69 points on Thursday, as the Resources and Financial sectors recorded losses.

### BRVM

BRVM Composite Index was up by 0.14% and closed at 209.59 points on Thursday, with Crown Siem Côte d'Ivoire and Safca Côte d'Ivoire being the top losers.

### NSE

NGX All-Share Index increased marginally by 0.07% to close at 70,819.49 on Thursday, as the Banking sector recorded gains.

### EGX

EGX 30 Index climbed by 1.36% and closed at 24,312.92 points on Thursday, as the market gained LE 16 billion of market cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index was down by 0.13% to close at 883.37 points on Thursday.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼	0.33%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲	0.14%
<b>NGX</b> Nigerian Stock Exchange	▲	0.07%
<b>EGX</b> Egyptian Stock Exchange	▲	1.36%
<b>ESG</b> Casablanca Stock Exchange	▼	0.13%

### African Markets

**Nigeria:** NGX 30 Index inched up by 0.09% to close at 2,604.24 points on Thursday. Fidelity and FBNH were the top gainers.

**Egypt:** EGX 30 Index climbed by 1.36% and closed at 24,312.92 points on Thursday, as the market gained LE 16 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index decreased by 0.54% and closed at 1,416.32 points on Thursday. Kenya Reinsurance Corporation Ltd and East African Breweries Limited were the top losers.

**South Africa:** JSE Top 40 Index decreased by 0.31% and closed at 66,351.81 points on Thursday, as the Resources and Financial sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	26.72%
Exchange Rate (I&E window)	₦ 996.75
<b>INTERBANK RATES</b>	
OPR	16.88 ▲
Overnight	17.62 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX Index was down by 0.17% to close at 9,528.95 points on Thursday, as losses in the Industrial, Energy, and Real Estate pushed shares lower. MSCI UAE decreased by 0.51% to close at 388.70 points.

**Vietnam:** VN-30 Index declined by 0.62% to close at 1,122.95 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam increased by 0.81% to close at 651.03 points.

**Saudi Arabia:** Tadawul All Share Index declined by 0.81% to close at 10,840.76 points on Thursday, as losses in the Diversified Financials, Pharma, Biotech & Life Science, and Transportation sectors pushed shares lower. MSCI Saudi Arabia declined by 0.89% and closed at 1,406.73 points.

**India:** Nifty 50 Index decreased by 0.25% to close at 19,395.30 points on Thursday, as losses in the Realty, Metal, and Consumer Durables sectors pushed shares lower. MSCI India decreased by 0.24% to close at 2,211.04 points.

### News

#### Nigeria:

Nigeria, Saudi sign MoU on energy cooperation  
FG earns N14.4tn from extractive sector – NEITI  
International Breweries gives N60m grant to young entrepreneurs

#### Kenya:

Safaricom stock jumps 6.8pc on Kenya unit profit growth  
Kenya calms markets with Sh45bn early Eurobond repayment  
Kenya to spend Sh36bn on Haiti mission, MPs unhappy

#### Abu Dhabi:

Dubai's non-oil sector rises in October as PMI Hits 57.4 on good business form  
Abu Dhabi Islamic Bank raises \$500m from green sukuk issuance  
Abu Dhabi's ADNOC makes new bid for stake in Brazil's Braskem; shares soar

#### Saudi Arabia:

Saudi Arabia signs \$533m deals with Africa as PIF plans 'game-changing' announcements  
Saudi energy minister signs 5 MoUs with African countries in sustainability push  
Saudi Arabia's PIF raises stakes in Aston Martin to 20.5%

#### Egypt:

eGate Egypt gets first licence for freight broker activity using IT  
Egypt, Turkey to sign free trade agreement: Finance Minister  
ADTIC develops a hotel overlooking the Pyramids with investments exceeding \$80m

#### South Africa:

Private investors are putting up signs money to stop load shedding  
SA still weighing impact of charging Eskom interest  
Stocks rise, treasuries steady on peak rates bet: Markets wrap

#### India:

Ashok Leyland reports Rs 561crore Q2 net profit  
Adani Ports Q2 profit rises 1.37 per cent to Rs 1,762 crore  
Reliance Retail to take Swadesh store to US and Europe

#### Vietnam:

Italian firms promote packaging products, technologies in Vietnam  
Vietnamese ride-hailing company launches service in Laos  
Mekong Connect Forum to run in HCM City in mid-November

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,528.95	-0.2%	0.2%	2.0%	-6.7%	AED/USD	3.67	0.0%	0.0%
Egypt	24,312.92	1.4%	7.4%	7.8%	66.5%	EGP/USD	30.90	0.0%	25.1%
India	19,395.30	-0.2%	0.9%	1.7%	7.1%	INR/USD	83.32	0.1%	0.7%
Kenya	1,416.32	-0.5%	-1.9%	-3.1%	-15.5%	KES/USD	151.75	0.1%	22.9%
Nigeria	2,604.24	0.1%	0.9%	2.2%	41.3%	NGN/USD	996.75	12.2%	53.7%
Saudi Arabia	10,840.76	-0.8%	-0.1%	1.4%	3.5%	SAR/USD	3.75	0.0%	-0.2%
South Africa	66,351.81	-0.3%	-0.8%	3.9%	-0.9%	ZAR/USD	18.67	0.9%	9.7%
Vietnam	1,122.95	-0.6%	3.4%	8.0%	11.7%	VND/USD	24,350.00	-0.1%	3.0%

## MSCI Emerging Markets

MSCI Frontier	480.40	0.3%	1.5%	4.3%	1.7%	Brent Crude (\$)	80.01	0.6%	-6.9%
MSCI Frontier 100	1,098.68	1.2%	1.6%	4.5%	0.7%	Gold (\$)	1,969.80	0.6%	7.9%
MSCI Emerging	956.25	-0.2%	0.8%	4.5%	-0.01%	Copper (\$)	8,147.00	0.1%	-2.7%
MSCI World (USD)	2,878.98	-0.3%	3.0%	4.0%	10.6%	Coffee (\$)	160.75	1.4%	2.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	16.00	8.5%	56.1%	73.05	Nascon	55.65	-2.7%	401.4%	147.82
Fidelity	9.50	4.4%	118.4%	319.06	FCMB	6.40	-1.5%	66.2%	5.48
FBNH	20.00	3.4%	83.5%	849.77	United Capital PLC	16.20	-0.6%	15.7%	28.20
Axamansard	4.30	0.9%	115.0%	2.84	Zenith	33.05	-0.5%	37.7%	682.22
Nigerian Breweries	38.00	0.7%	-7.3%	92.91	Lafarge Africa	29.30	-0.3%	22.1%	165.38
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	6.40	6.40	0.0%	5.48	Cap	20.00	15.25	31.1%	0.09
Zenith	33.05	33.05	0.0%	682.22	Unilever	13.80	10.50	31.4%	0.90
Wema	4.99	4.99	0.0%	12.67	Nestle	1050.00	764.90	37.3%	1052.62
UBA	20.80	20.80	0.0%	1548.24	UBN	6.50	4.65	39.8%	0.61
UACN	16.00	16.00	0.0%	73.05	Custodian	7.00	4.55	53.8%	9.29

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
AGTHIA Group	4.95	5.1%	24.4%	14.59	GHITHA HOLDING P	38.80	-3.7%	-46.8%	11.36
Q Holding PSC	3.40	3.3%	-15.0%	87.72	Sharjah Cement and Industrial Development Co.	0.59	-2.3%	-4.7%	0.03
FOODCO NATIONAL FOODSTUFF PrJSC	1.74	3.0%	-31.0%	0.00	Emirates Telecom. Group Company	19.50	-2.3%	-14.7%	22.41
Americana Restaurants International PLC	3.37	1.8%	13.5%	17.34	National Marine Dredging Co.	23.52	-1.8%	-3.9%	34.63
Abu Dhabi National Energy Company	3.17	1.6%	-7.6%	3.63	Abu Dhabi National Oil Co. For Distribut	3.46	-1.7%	-21.5%	27.04
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	Ras Alkhaima National Insurance	3.70	3.70	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£)
Commercial International Bank (Egypt)	73.00	4.1%	76.0%	335.56	Fawry For Banking Technology And Electronic Payment	5.20	-4.6%	-0.8%	142.92
Telecom Egypt	35.12	3.8%	39.9%	84.40	E-finance For Digital and Financial Investments	16.92	-3.8%	-11.0%	27.12
Edita Food Industries S.A.E	30.00	3.5%	116.0%	30.75	Credit Agricole Egypt	20.50	-2.7%	142.3%	52.86
Abou Kir Fertilizers	82.21	2.8%	111.9%	195.12	Alexandria Mineral Oils Company	9.95	-2.1%	57.4%	80.68
Ezz Steel	78.95	2.3%	239.6%	23.32	Heliopolis Housing	11.55	-1.6%	45.1%	140.51
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	35.12	35.12	0.0%	84.40	Alexandria Containers and goods	38.47	29.50	30.4%	20.95
T M G Holding	23.00	23.00	0.0%	130.26	Madinet Masr For Housing and Development	3.50	2.46	42.3%	89.16
Sidi Kerir Petrochemicals - SIDPEC	29.11	29.11	0.0%	32.35	E-finance For Digital and Financial Investments	16.92	11.25	50.4%	27.12
Palm Hills Development Company	2.59	2.59	0.0%	63.38	B Investments Holding	17.32	10.42	66.2%	9.23
Oriental Weavers	17.88	17.88	0.0%	31.80	Fawry For Banking Technology And Electronic Payment	5.20	2.77	87.7%	142.92

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	1550.00	4.2%	24.1%	0.00	Adani Enterprises Limited	2219.95	-1.8%	-42.5%	0.00
Apollo Hospitals Enterprise Ltd	5300.00	3.7%	18.4%	0.00	HUL	2479.80	-1.6%	-3.2%	0.00
Coal India	323.90	2.1%	43.9%	0.00	Adani Ports And Sez.	806.05	-1.6%	-1.5%	0.00
Power Grid Corp Of India	210.00	1.5%	-1.7%	0.00	Tata Consumer products ltd.	902.95	-1.5%	17.7%	0.00
Indusind Bank	1509.90	1.4%	23.8%	0.00	ONGC	192.55	-1.4%	31.2%	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 ₹)
Power Grid Corp Of India	210.00	210.50	-0.2%	0.00	Hdfc Bank	1486.50	1460.25	1.8%	0.00
Sun Pharma Industries	1179.80	1183.25	-0.3%	0.00	HUL	2479.80	2393.00	3.6%	0.00
Indusind Bank	1509.90	1516.30	-0.4%	0.00	UPL	550.00	528.15	4.1%	0.00
Apollo Hospitals Enterprise Ltd	5300.00	5364.00	-1.2%	0.00	Reliance Industries	2311.45	2180.00	6.0%	0.00
Ultratech Cement	8632.75	8750.95	-1.4%	0.00	Kotak Mahindra Bank	1747.25	1643.50	6.3%	0.00

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Safaricom Plc	13.30	6.8%	-44.9%	230.17	Kenya Reinsurance Corporation Ltd	1.70	-4.5%	-7.1%	0.05
Stanbic Holdings	102.00	1.7%	0.0%	0.17	East African Breweries Limited	118.50	-2.9%	-29.3%	0.31
Centum Investment Company Plc	8.90	0.9%	6.5%	0.27	Diamond Trust Bank Limited	44.15	-1.9%	-11.7%	0.13
Nairobi Securities Exchange Plc	5.88	0.7%	-13.3%	0.05	Kenya Power & Lighting Limited	1.38	-1.4%	-11.5%	0.16
Nation Media Group	20.15	0.5%	26.3%	0.07	NCBA Group Plc	35.35	-1.3%	-10.2%	0.31
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	151.00	171.00	-11.7%	2.81	Bamburi Cement Limited	22.50	22.50	0.0%	0.00
NCBA Group Plc	35.35	41.70	-15.2%	0.31	The Cooperative Bank of Kenya Ltd	10.20	10.20	0.0%	11.28
Nation Media Group	20.15	23.90	-15.7%	0.07	WPP Scangroup Plc	2.39	2.39	0.0%	0.01
Absa Bank Kenya	10.85	12.95	-16.2%	0.39	Diamond Trust Bank Limited	44.15	44.00	0.3%	0.13
Stanbic Holdings	102.00	129.75	-21.4%	0.17	British American Tobacco Kenya Ltd	402.00	400.00	0.5%	0.24

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Baha Investment and Development Co.	0.14	7.7%	-98.8%	0.52	Maharah Human Resources Co.	63.50	-9.9%	23.3%	54.80
Naseej International Trading Co	45.65	7.5%	10.5%	35.84	National Agricultural Development Co.	20.48	-7.0%	0.3%	16.69
Thob Al Aseel Co.	4.79	7.4%	-87.3%	28.29	Arabian Contracting Services Co.	178.00	-6.5%	66.4%	129.32
Tabuk Agricultural Development Co.	15.30	6.7%	0.7%	15.73	Nama Chemicals Co.	29.95	-4.9%	-9.2%	6.89
Al-Omran Industrial & Trading Co	35.60	6.4%	-49.8%	12.59	Raydan Food Co.	23.64	-4.9%	13.2%	2.91
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.	113.40	113.40	0.0%	38.55	Abdullah Al Othaim Markets Co.	12.96	12.96	0.0%	5.49
Saudi Aramco Base Oil Co.	135.40	135.40	0.0%	52.76	Abdulmohsen Alhokair Group for Tourism and Development	2.01	2.01	0.0%	2.60
Arabian Drilling Co.	187.20	187.20	0.0%	58.71	Advanced Petrochemical Co.	37.55	37.55	0.0%	7.51
Riyadh Cables Group Co.	73.50	73.50	0.0%	11.69	Al Kathiri Holding Co.	2.39	2.39	0.0%	1.40
Retal Urban Development Co.	0.00	0.00	0.0%	0.00	AlAhli REIT Fund 1	7.80	7.80	0.0%	0.47

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Vodacom Group Ltd	10938.00	3.0%	-10.9%	17610.18	AngloGold Ashanti Ltd	31935.00	-8.4%	-3.0%	45667.05
Mondi PLC	30979.00	2.4%	6.5%	14049.29	MultiChoice Group	6750.00	-4.2%	-42.4%	9652.50
Anglo American Platinum Ltd	66410.00	1.7%	-53.4%	20363.96	Sibanye Stillwater Ltd	2323.00	-3.5%	-96.5%	0.00
BHP Group Ltd	53658.01	1.5%	1.9%	17318.12	Anglo American PLC	47174.00	-1.6%	108.7%	34239.83
Sasol Ltd	22681.00	1.5%	-15.8%	22907.81	Shoprite Holdings Ltd	24650.00	-1.3%	9.1%	6415.66
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)
Bid Corp Ltd	42469.00	42469.00	0.0%	29287.90	Nedbank Group Ltd	20748.00	20748.00	0.0%	26349.96
Reinet Investments SCA	41216.00	41443.00	-0.5%	13739.35	Sasol Ltd	22681.00	22625.00	0.2%	22907.81
Anheuser-Busch InBev SA/NV	111581.00	112393.00	-0.7%	14433.00	Anglo American PLC	47174.00	46967.00	0.4%	32557.14
Remgro Ltd	13994.00	14210.00	-1.5%	11018.18	Mondi PLC	30979.00	30676.00	1.0%	14049.29
Aspen Pharmacare Holdings Ltd	17070.00	17401.00	-1.9%	9177.51	Growthpoint Properties Ltd	1034.00	1020.00	1.4%	16957.60

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vingroup JSC	45400.00	5.6%	-15.6%	328.098,26	Vietnam Prosperity	20000.00	-6.3%	11.7%	275.184,20
Vinhomes	42900.00	4.6%	-10.6%	656.725,23	Vietjet Aviation	108400.00	-4.1%	-1.0%	101.836,55
Vincom Retail	24300.00	2.5%	-7.6%	140.606,74	Saigon Beer Alcohol Beverage Corp.	63900.00	-1.8%	-61.7%	67.014,96
Investment & Industrial Development JS Corp.	61000.00	2.4%	-24.3%	21.438,26	Vietcombank	87900.00	-1.8%	9.9%	103.253,84
Saigon Securities Inc	30850.00	1.8%	74.3%	1.056.992,78	Masan Group Corp	62800.00	-1.6%	-32.5%	102.805,70
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%	195.362,94	BaoViet Holdings	41000.00	41000.00	0.0%	16.231,15
Vietcombank	87900.00	96000.00	-8.4%	103.253,84	Petrovietnam Gas	80000.00	80000.00	0.0%	49.995,85
Bank for Inv. and Devp	42850.00	49950.00	-14.2%	32.480,48	Masan Group Corp	62800.00	62800.00	0.0%	102.805,70
Saigon-Hanoi Commercial Bank	11250.00	13600.00	-17.3%	229.541,51	Mobile World Inv. Corp	40300.00	40300.00	0.0%	493.245,73
Vinamilk	70700.00	87004.15	-18.7%	244.324,76	Saigon Beer Alcohol Beverage Corp.	63900.00	63900.00	0.0%	67.014,96

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