



Daily Market Report

23 November 2023

JSE All-Share Index increased by 0.66% and closed at 74,763.94 points on Wednesday, as the Resources and Industrial sectors recorded gains.

BRVM Composite Index was up by 0.13% and closed at 209.88 points on Wednesday, with Bollore Transport & Logistics and Filtisac Côte d'Ivoire being the

NSF

NGX All-Share Index inched down by 0.09% to close at 71,003.98 on Wednesday, as the Consumer Goods and Industrial sectors recorded losses.

EGX 30 Index jumped by 1.03% and closed at 25.029.57 points on Wednesday, as the market gained LE 18 billion of market cap, amid Egyptian and Arab buying.

Casablanca ESG 10 Index increased by 0.35% to close at 888.01 points on Wednesday.

Capital Markets		
JSE Johannesburg Stock Exchange	A	0.66%
BRVM Bourse Régionale des Valeurs Mobilières	A	0.13%
NGX Nigerian Stock Exchange	•	0.09%
EGX Egyptian Stock Exchange	A	1.03%
ESG Casablanca Stock Exchange	A	0.35%

African Markets

Nigeria: NGX 30 Index was down by 0.14% to close at 2.602.80 points on Wednesday. International Breweries and FBNH were the top losers.

Egypt: EGX 30 Index jumped by 1.03% and closed at 25,029.57 points on Wednesday, as the market gained LE 18 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.77% and closed at 1,494.29 points on Wednesday. Bamburi Cement Limited and Kenya Reinsurance Corporation Ltd were the top gainers.

South Africa: JSE Top 40 Index increased by 0.71% and closed at 68,689.75 points on Wednesday, as the Resources and Industrial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	27.33%
Exchange Rate (I&E window)	₦ 840.53
INTERBANK RATES OPR	23.83 ▲
Overnight	25.17 🛕

Other Emerging Markets

Abu Dhabi: ADX Index inched down by 0.09% to close at 9,532.79 points on Wednesday, as losses in the Telecommunications, Healthcare and Financials pushed shares lower. MSCI UAE decreased by 0.32% to close at 391.68 points.

Vietnam: VN-30 Index was up by 0.11% to close at 1,109.80 points on Wednesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.67% to close at 657.26 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.26% to close at 11,099.98 points on Wednesday, as losses in the Banks, Diversified Financials, and Food & Staples Retailing sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.35% and closed at 1,436.82 points.

India: Nifty 50 Index was up by 0.14% to close at 19,811.85 points on Wednesday, as gains in the IT, Auto, and Oil & Gas sectors led shares higher. MSCI India increased by 0.24% to close at 2,265.12 points.

News

Nigeria:

Equity market slide by N35bn over MTN, others din

Access Bank, ASolar launch green energy solution for SMEs

Govt, UN to raise \$5bn annually for poverty alleviation

Kenya:

KCB guarantees in G-to-G fuel imports hit Sh515bn

Court rejects plot to stop Sh357m graft case against KRA chair

World Bank reveals new Sh1.8 trillion loans

for Kenva

Saudi Arabia:

GCC economy set to grow 3.7% in 2025: World

Abu Dhabi Fund for Development-financed

3.5MW solar plant inaugurated in Somalia

Abu Dhabi Ports linked to \$2bn swoop for

Dubai attracts 15 MNCs, 77 SMEs in first 9

Meratus bulker and container ship fleet

Abu Dhabi:

months 2023

Middle East investment in global green tech up nearly 200%: PwC

Ma'aden to use Saudi Arabia's 1st hydrogenpowered trucks

Egypt:

Egypt's trade exchange with other Nile Basin countries reaches \$3.041bn in 2022 Islamic banking in Egypt grows by 27% in 2023, reaching EGP 562bn: EIFA

Egyptian building materials exports jumped by 20% in 2023

South Africa:

domestic Sukuk

Growthpoint still battling with double-digit office vacancies SA returns to Islamic bond market with

SA inflation hits five-month high before rate decision

India:

Survey of India, Genesys tie up for 3D digital twin-mapping programme in India Salesforce India revenue surges 50% to ₹6,590 crore

Amazon, Inland Waterways Authority of India sign MoU to promote cargo movement

Vietnam:

green agriculture

Nearly 5,800 new enterprises established in Binh Duong in 10 months Vietnamese businesses see potential to penetrate Canadian market Vietnam, Denmark cooperate in developing

fSdh

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Indices and F	(Data								
Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,532.79	-0.1%	-0.4%	2.0%	-6.6%	AED/USD	3.67	0.0%	0.0%
Egypt	25,029.57	1.0%	2.7%	11.0%	71.5%	EGP/USD	30.90	0.0%	25.1%
India	19,811.85	0.1%	0.4%	3.8%	9.4%	INR/USD	83.55	0.2%	1.0%
Kenya	1,494.29	0.8%	1.5%	2.3%	-10.8%	KES/USD	152.80	0.1%	23.7%
Nigeria	2,602.80	-0.1%	-0.3%	2.2%	41.3%	NGN/USD	840.53	1.1%	45.1%
Saudi Arabia	11,099.98	-0.3%	0.2%	3.8%	5.9%	SAR/USD	3.75	0.0%	-0.2%
South Africa	68,689.75	0.7%	1.1%	7.5%	2.6%	ZAR/USD	18.89	1.4%	10.9%
Vietnam	1,109.80	0.1%	0.6%	6.8%	10.4%	VND/USD	24,215.00	0.3%	2.5%
MCCI 5 :									
MSCI Emergi	ng Markets								
MSCI Frontier	490.11	-0.05%	0.8%	6.4%	3.8%	Brent Crude (\$)	81.96	-0.6%	-4.6%
MSCI Frontier	1,121.66	0.1%	1.2%	6.7%	2.8%	Gold (\$)	1,992.80	-0.4%	9.1%
MSCI Emergin	g 983.60	-0.5%	0.7%	7.5%	2.8%	Copper (\$)	8,353.50	-1.1%	-0.2%
MSCI World (U	(SD) 3,004.76	0.2%	0.7%	8.5%	15.4%	Coffee (\$)	161.01	-1.2%	3.1%

STOCKS

Nigeria									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	7.65	4.8%	28.6%	6.54	International Breweries	4.25	-5.6%	-9.6%	1.11
Unilever	14.80	4.2%	27.6%	13.22	FBNH	19.20	-4.0%	76.1%	56.50
Cadbury	15.65	3.3%	31.5%	12.73	Dangote Sugar	60.00	-1.6%	273.8%	61.79
Guaranty	38.20	2.4%	66.1%	1284.49	Lafarge Africa	29.50	-1.3%	22.9%	102.20
Zenith	33.40	0.6%	39.2%	479.84	Sterling	3.64	-0.8%	160.0%	19.40
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn N)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
FCMB	6.80	6.80	0.0%	19.82	Cap	20.10	15.25	31.8%	0.60
Zenith	33.40	33.40	0.0%	479.84	Nestle	1050.00	764.90	37.3%	250.50
Wema	5.18	5.18	0.0%	19.57	Unilever	14.80	10.50	41.0%	13.22
UBA	20.75	20.75	0.0%	407.35	UBN	6.80	4.65	46.2%	2.89
UACN	17.90	17.90	0.0%	23.66	International Breweries	4.25	2.70	57.4%	1.11

Abu Dhabi									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging Co.	27.92	9.5%	14.1%	45.43	Gulf Cement Co.	0.36	-6.0%	-30.4%	0.00
Hayah Insurance Company P.J.S.C	1.36	6.3%	40.2%	0.86	PALMS SPORTS	11.74	-5.3%	19.8%	2.78
National Bank of Umm Al Qaiwain	1.80	5.3%	0.6%	0.38	Easy Lease Motorcycle Rental	30.74	-4.6%	-11.7%	9.81
Fujairah Cement Industries	0.35	1.5%	-28.6%	0.00	Sudatel Telecom Group Co Limited	0.28	-4.4%	-39.1%	0.03
Americana Restaurants International PLC	3.40	1.2%	14.5%	14.47	Al Buhaira National Insurance Company	2.80	-3.5%	9.8%	0.43
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	Bayanat AI PLC	0.00	0.00	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Abu Dhabi National Hotels Co.	0.84	0.84	0.0%	3.72
Gulf Investment House Company	4.50	4.50	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Invest Bank			0.00/	0.00	The National	0.41	0.41	0.0%	0.00
IIIVest Balik	0.00	0.00	0.0%	0.00	Investor PRJSC	0.41	0.41	0.070	0.00
The National Investor PRJSC	0.00	0.00	0.0%	0.00	Investor PRJSC United Fidelity Insurance Company	1.60	1.60	0.0%	0.00



Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Fawry For Banking Technology And Electronic Payment	5.24	20.0%	0.0%	130.06	SODIC	23.00	-4.7%	52.0%	26.91
Orascom Construction PLC	183.00	6.2%	90.7%	105.23	Eastern Company	27.32	-2.4%	90.9%	92.61
Palm Hills Development Company	2.99	4.5%	52.6%	106.59	Egyptian Iron&Steel	12.70	-2.2%	88.7%	7.16
Madinet Masr For Housing and Development	3.75	4.4%	15.4%	89.89	Sidi Kerir Petrochemicals - SIDPEC	30.52	-1.5%	132.6%	16.83
T M G Holding	25.00	4.3%	150.3%	52.25	Abou Kir Fertilizers	84.33	-1.3%	4202.6%	65.83
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£)
T M G Holding	25.00	25.00	0.0%	52.25	Fawry For Banking Technology And Electronic Payment	5.24	4.15	26.3%	130.06
Oriental Weavers	17.84	18.33	-2.7%	14.49	E-finance For Digital and Financial Investments	18.01	14.16	27.2%	22.87
Orascom Construction PLC	183.00	188.10	-2.7%	105.23	B Investments Holding	17.95	13.40	34.0%	41.11
Telecom Egypt	37.10	38.20	-2.9%	80.51	Alexandria Containers&goods	41.69	29.50	41.3%	6.27
Sidi Kerir Petrochemicals - SIDPEC	30.52	31.95	-4.5%	16.83	Madinet Masr For Housing and Development	3.75	2.63	42.6%	89.89
India									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹
Bharat Petroleum	402.30	3.7%	21.7%	514.20	Indusind Bank	1470.45	-2.1%	20.5%	578.2
Cipla	1272.90	1.6%	18.3%	220.97	Kotak Mahindra Bank	1744.90	-1.3%	-4.5%	789.30
Bajaj Auto	5763.00	1.4%	59.4%	284.58	Adani Ports And Sez.	792.00	-1.2%	-3.2%	254.8
Infosys	1457.30	1.3%	-3.4%	450.27	Hindalco Industries	501.00	-1.2%	5.8%	217.58
NTPC	253.00	1.2%	52.0%	133.03	Adani Enterprises Ltd	2175.00	-1.0%	-43.6%	271.3
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹
Titan Company	3429.95	3435.00	-0.1%	335.63	Hdfc Bank	1512.90	1460.25	3.6%	2203.55
Hero Motocorp	3416.40	3427.70	-0.3%	264.29	HUL	2519.70	2393.00	5.3%	205.36
Hcl Technologies	1330.00	1336.00	-0.4%	203.94	Kotak Mahindra Bank	1744.90	1643.50	6.2%	789.30
Bharti Airtel	970.00	976.35	-0.7%	321.31	UPL	565.95	528.15	7.2%	150.13
SBI Life Insurance	1428.00	1438.55	-0.7%	123.58	Reliance Industries	2387.00	2180.00	9.5%	1018.10
Kenya									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD% V	al (mn KSh)
Bamburi Cement Limited	32.10	3.7%	1.9%	3.41	Centum Investment Company Plc	8.58	-3.4%	2.6%	2.75
Kenya Reinsurance Corporation Ltd	1.80	2.9%	-1.6%	0.02	Kenya Power & Lighting Limited	1.38	-2.1%	-11.5%	0.29
Standard Chartered Bank Kenya Ltd	160.25	2.6%	12.3%	2.40	Diamond Trust Bank Limited	45.55	-1.0%	-8.9%	0.19
Safaricom Plc	13.70	1.9%	-43.3%	44.67	Kengen Limited	2.30	-0.9%	-28.6%	3.46
KCB Group Plc	20.75	1.5%	-45.5%	7.76	The Cooperative Bank of Kenya Ltd	11.50	-0.9%	-6.5%	4.73
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change V	al (mn KSh)
Standard Chartered Bank Kenya	160.25	171.00	-6.3%	2.40	Total Kenya Ltd	15.85	15.80	0.3%	0.05
Ltd Absa Bank Kenya	11.35	12.95	-12.4%	0.55	WPP Scangroup Plc	2.29	2.24	2.2%	0.02
NCBA Group Plc	35.95	41.70	-13.8%	2.03	British American	410.00	400.00	2.5%	0.12
Nation Media Group	20.00	23.90	-16.3%	0.21	Tobacco Kenya Ltd Diamond Trust Bank	45.55	44.00	3.5%	0.19
The Cooperative Bank of Kenya Ltd	11.50	14.00	-17.9%	4.73	Limited East African Breweries Limited	114.25	110.00	3.9%	1.10



The Cooperative Bank of Kenya Ltd

Breweries Limited

Sauc		

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD% Val (mn SAR)
Electrical Industries Co.	2.38	8.7%	-89.9%	82.29	Al Moammar Information Systems Co.	123.80	-3.0%	32.8%	36.52
AlSaif Stores for Development and Investment Co.	8.21	5.4%	-91.0%	63.10	Filing and Packing Materials Manufacturing Co.	45.90	-2.9%	31.7%	22.63
Al-Omran Industrial & Trading Co	37.00	4.2%	-47.8%	12.73	Sahara International Petrochemical Co.	33.35	-2.6%	-1.8%	58.91
Development Works Food Co.	143.60	4.1%	-6.6%	110.03	Saudi Kayan Petrochemical Co.	11.10	-2.5%	-18.7%	16.14
The National Company for Glass Industries	35.00	3.7%	6.9%	18.63	Derayah REIT Fund	8.00	-2.4%	-20.9%	2.05
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.	123.40	123.40	0.0%	42.59	Abdullah Al Othaim Markets Co.	12.82	12.82	0.0%	8.96
Saudi Aramco Base Oil Co.	137.20	137.20	0.0%	56.71	Abdulmohsen Alhokair Group for Tourism and Development	2.15	2.15	0.0%	5.60
Arabian Drilling Co.	178.80	178.80	0.0%	34.35	Advanced Petrochemical Co.	37.90	37.90	0.0%	24.82
Power & Water Utility Co for Jubail & Yanbu	58.60	58.60	0.0%	160.60	Al Kathiri Holding Co.	2.59	2.59	0.0%	48.42
Riyadh Cables Group Co.	75.30	75.30	0.0%	49.83	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	2015.00	7.8%	-54.9%	162550.05	Sasol Ltd	21200.00	-4.0%	-21.3%	65296.00
Anglo American Platinum Ltd	70028.00	6.1%	-50.9%	23636.55	MTN Group Ltd	9669.00	-1.8%	-24.0%	27363.27
Gold Fields Ltd	25894.00	3.0%	47.0%	57484.68	Investec Ltd	11718.00	-1.5%	-5.0%	10633.03
British American Tobacco PLC	59650.00	2.7%	-11.5%	23253.96	Discovery Ltd	13531.00	-1.2%	-90.5%	14884.10
Anheuser-Busch InBev SA/NV	117050.00	2.7%	14.3%	19684.30	Investec PLC	11930.00	-1.2%	-91.6%	11151.57
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	117050.00	117230.00	-0.2%	19684.30	Mondi PLC	31779.00	31707.00	0.2%	20270.24
Aspen Pharmacare Holdings Ltd	17555.00	17634.00	-0.4%	6546.08	Nedbank Group Ltd	20801.00	20738.00	0.3%	15288.32
Bid Corp Ltd	40650.00	40950.00	-0.7%	44715.00	Sasol Ltd	21200.00	21120.00	0.4%	65296.00
Reinet Investments SCA	44945.00	45331.00	-0.9%	16140.20	Growthpoint Properties Ltd	1032.00	1024.00	0.8%	18173.52
Remgro Ltd	14436.00	14669.00	-1.6%	10997.20	Anglo American PLC	52463.00	51850.00	1.2%	51109.45

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn d)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietjet Aviation	108200.00	1.5%	-1.2%	83.767,56	Mobile World Inv. Corp	39800.00	-2.7%	-7.2%	579.262,84
FPT Corp	93000.00	1.2%	20.9%	303.189,82	Vingroup JSC	42000.00	-1.4%	-21.9%	160.266,70
Saigon Securities Inc	32900.00	1.1%	85.9%	748.017,56	Bank for Inv. and Devp	43600.00	-0.8%	13.0%	32.207,97
Vincom Retail	22800.00	0.9%	-13.3%	77.016,77	Ho Chi Minh City Devp	18600.00	-0.5%	16.6%	124.294,86
Viet Nam International Commercial Joint Stock Bank	19200.00	0.8%	1.1%	44.577,31	Investment & Industrial Development JS Corp.	59900.00	-0.5%	-25.7%	16.473,49
Stocks near 52 w high	Last Price	52w H	0/ 61	** *	Stocks near 52 w		v		Value (mn
	Last Trice	32W 11	% Change	Value (mn ₫)	Low	Last Price	52w L	% Change	<u>d</u>)
FPT Corp	93000.00	97944.43	-5.0%	303.189,82		40850.00	40850.00	% Change 0.0%	*
FPT Corp Vietcombank					Low				₫)
	93000.00	97944.43	-5.0%	303.189,82	Low BaoViet Holdings	40850.00	40850.00	0.0%	9.883,95
Vietcombank	93000.00 86700.00	97944.43 96000.00	-5.0% -9.7%	303.189,82 87.170,85	Low BaoViet Holdings Petrovietnam Gas	40850.00 79000.00	40850.00 79000.00	0.0%	9.883,95 37.931,63

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