

Daily Market Report

24 November 2023

JSE

JSE All-Share Index increased by 0.90% and closed at 75,438.69 points on Thursday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index was up by 0.11% and closed at 210.11 points on Thursday, with Total Senegal and Crown Siem Côte d'Ivoire being the top gainers.

NSE

NGX All-Share Index inched up by 0.07% to close at 71,052.85 on Thursday, as the Insurance, Industrial, and Banking sectors recorded gains.

EGX

EGX 30 Index climbed by 1.96% and closed at 25,519.49 points on Thursday, as the market gained LE 19.14 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index decreased by 0.22% to close at 886.07 points on Thursday.

Capital Markets

JSE Johannesburg Stock Exchange	▲	0.90%
BRVM Bourse Régionale des Valeurs Mobilières	▲	0.11%
NGX Nigerian Stock Exchange	▲	0.07%
EGX Egyptian Stock Exchange	▲	1.96%
ESG Casablanca Stock Exchange	▼	0.22%

African Markets

Nigeria: NGX 30 Index increased marginally by 0.04% to close at 2,603.86 points on Thursday. Guaranty and Transcorp were the top gainers.

Egypt: EGX 30 Index climbed by 1.96% and closed at 25,519.49 points on Thursday, as the market gained LE 19.14 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.75% and closed at 1,505.52 points on Thursday. Bamburi Cement Limited and Kenya Power & Lighting Limited were the top gainers.

South Africa: JSE Top 40 Index increased by 0.95% and closed at 69,340.50 points on Thursday, as the Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	27.33%
Exchange Rate (I&E window)	₦ 956.33
INTERBANK RATES	
OPR	25.67 ▲
Overnight	26.67 ▲

Other Emerging Markets

Abu Dhabi: ADX Index inched up by 0.01% to close at 9,533.51 points on Thursday, as gains in the Healthcare, Real Estate, and Financials led shares higher. MSCI UAE inched up by 0.02% to close at 391.77 points.

Vietnam: VN-30 Index fell by 2.44% to close at 1,082.68 points on Thursday, as blue-chip companies recorded losses. MSCI Vietnam fell by 3.29% to close at 635.61 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.20% to close at 11,078.08 points on Thursday, as losses in the Telecommunication Services, Diversified Financials, and Banks sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.42% and closed at 1,430.84 points.

India: Nifty 50 Index inched down by 0.05% to close at 19,802.00 points on Thursday, as losses in the IT, Healthcare, and Pharma sectors pushed shares lower. MSCI India inched down by 0.07% to close at 2,263.56 points.

News

Nigeria:

FG spent N231bn on arms in four years – Report
Pharmaceutical imports hit N3tn in six years, says RMRDC
Ogun Customs impound goods, generate N30m

Kenya:

State mute on 2.75pc NHIF rate as new Fund kicks in
StanChart in Sh2.27bn dividend, profit up
Court rejects plot to stop Sh357m graft case against KRA chair

Abu Dhabi:

UAE's Masdar and Emirates Steel Arkan partner to decarbonize hard-to-abate steel sector
Dubai's inflation moderates to 4.27% in October: official data
Abu Dhabi's PureHealth acquires leading tech company

Saudi Arabia:

Saudi Arabia's trade surplus rises over 27% to \$11.66bn in September: GASTAT
Saudi EXIM Bank and Thai counterpart sign MoU to propel trade exchange
Transport and sea freight commercial registrations in Eastern Province surge 28% Q3

Egypt:

AAAID plans to invest \$100M in Egypt over 3 years
Trade exchange between Egypt, COMESA countries increase to \$5.431bn in 2022
MEGAMIND negotiates EGP 4bn healthcare digitization project in Egypt

South Africa:

Repo rate remains at 8.25% – Kganyago
Nedbank weighs wealth changes, Africa expansion under new CEO
Mr Price shares surge as Studio 88 acquisition pays off

India:

Paper imports jump 43% in H1 of FY24, says IPMA
HSBC, UK finance corporates tie up for 100-million-pound fund for desi MSMEs
Hybrid Mutual Funds attract ₹72,000 crore in past 7 months

Vietnam:

Vietnam's animal feed, raw material imports reach 4.27 billion USD
Canada supports Tra Vinh's small, medium-sized enterprises
Transactions worth from 400 million VND to be reported to state bank

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,533.51	0.01%	-0.4%	2.0%	-6.6%	AED/USD	3.67	0.0%	0.0%
Egypt	25,519.49	2.0%	4.7%	13.2%	74.8%	EGP/USD	30.90	0.0%	25.1%
India	19,802.00	-0.05%	0.4%	3.8%	9.4%	INR/USD	83.33	-0.3%	0.7%
Kenya	1,505.52	0.8%	2.3%	3.0%	-10.2%	KES/USD	152.85	0.0%	23.8%
Nigeria	2,603.86	0.04%	-0.3%	2.2%	41.3%	NGN/USD	956.33	13.1%	51.7%
Saudi Arabia	11,078.08	-0.2%	-0.04%	3.6%	5.7%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,340.50	0.9%	2.1%	8.6%	3.6%	ZAR/USD	18.81	-0.4%	10.5%
Vietnam	1,082.68	-2.4%	-1.9%	4.2%	7.7%	VND/USD	24,247.50	0.1%	2.6%

MSCI Emerging Markets

MSCI Frontier	486.78	-0.7%	0.2%	5.7%	3.1%	Brent Crude (\$)	81.96	0.0%	-4.6%
MSCI Frontier 100	1,113.84	-0.7%	0.5%	5.9%	2.1%	Gold (\$)	1,992.80	0.0%	9.1%
MSCI Emerging	988.08	0.5%	1.2%	8.0%	3.3%	Copper (\$)	8,409.50	0.7%	0.4%
MSCI World (USD)	3,008.74	0.1%	0.8%	8.7%	15.6%	Coffee (\$)	161.77	0.5%	3.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guaranty	38.95	2.0%	69.3%	177.84	Sterling	3.50	-3.8%	150.0%	8.34
Custodian	7.70	0.7%	29.4%	10.13	Unilever	14.30	-3.4%	23.3%	16.01
Transnational Corporation	6.17	0.3%	446.0%	45.65	Cadbury	15.35	-1.9%	29.0%	11.93
Zenith	33.50	0.3%	39.6%	694.17	FBNH	19.00	-1.0%	74.3%	177.26
Wema	5.19	0.2%	33.1%	16.49	United Capital PLC	16.80	-0.9%	20.0%	32.04
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	6.75	6.75	0.0%	35.70	Cap	20.10	15.25	31.8%	1.23
Zenith	33.50	33.50	0.0%	694.17	Unilever	14.30	10.50	36.2%	16.01
Wema	5.19	5.19	0.0%	16.49	Nestle	1050.00	764.90	37.3%	9.49
UBA	20.75	20.75	0.0%	160.49	UBN	6.80	4.65	46.2%	2.89
UACN	17.90	17.90	0.0%	5.17	International Breweries	4.25	2.70	57.4%	1.76

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
PALMS SPORTS PrJSC	12.82	9.2%	30.8%	6.62	Union Insurance Co.	0.55	-10.0%	-12.8%	0.00
Gulf Cement Co.	0.40	9.1%	-24.0%	0.00	Hayah Insurance Company P.J.S.C	1.25	-8.1%	28.9%	0.05
BURJEEL HOLDINGS PLC	3.25	7.3%	43.2%	35.31	FOODCO NATIONAL FOODSTUFF PrJSC	1.62	-5.8%	-35.7%	0.00
Presight AI Holding PLC	2.48	4.6%	-23.7%	15.24	RAK Co. for White Cement & Const Materials	1.10	-4.4%	-38.5%	0.03
Easy Lease Motorcycle Rental PJSC	32.14	4.6%	-7.6%	9.24	ADNOC Gas plc	3.23	-2.4%	14.9%	53.86
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	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
Gulf Investment House Company	4.50	4.50	0.0%	0.00	The National Investor PRJSC	0.41	0.41	0.0%	0.00
Invest Bank	0.00	0.00	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	0.0%	0.00
The National Investor PRJSC	0.41	0.41	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£)
Juhayna Food Industries	16.24	7.6%	65.9%	38.98	T M G Holding	24.51	-2.0%	145.3%	24.51
Orascom Invest	0.47	6.9%	69.1%	79.94	SODIC	22.61	-1.7%	49.4%	0.98
Credit Agricole Egypt	21.75	6.2%	157.1%	13.70	Eastern Company	27.00	-1.2%	88.7%	2.75
Commercial International Bank (Egypt)	79.30	5.1%	91.2%	678.81	Madinet Masr For Housing and Development	3.72	-0.8%	14.5%	0.55
Abu Dhabi Islamic Bank- Egypt	38.36	5.1%	113.5%	34.68	Ibsina Pharma	2.62	-0.8%	21.3%	0.49
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£)
Oriental Weavers	18.20	18.33	-0.7%	34.58	Madinet Masr For Housing and Development	3.72	3.72	0.0%	59.78
Orascom Construction PLC	185.07	188.00	-1.6%	69.88	E-finance For Digital and Financial Investments	17.92	17.70	1.2%	23.65
Sidi Kerir Petrochemicals - SIDPEC	30.36	31.04	-2.2%	16.93	Alexandria Containers&goods	41.90	41.36	1.3%	7.90
T M G Holding	24.51	25.20	-2.7%	24.25	Fawry For Banking Technology And Electronic Payment	5.32	5.21	2.1%	120.29
Telecom Egypt	36.77	37.90	-3.0%	36.77	B Investments Holding	18.37	18.00	2.1%	51.62

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hero Motocorp	3568.00	4.5%	30.3%	608.66	Cipla	1174.40	-7.6%	9.2%	912.20
Bajaj Auto	5932.00	3.1%	64.0%	661.13	Ultratech Cement	8604.55	-1.8%	23.6%	297.44
Bharat Petroleum	411.05	2.2%	24.4%	330.12	SBI Life Insurance	1408.10	-1.5%	14.4%	77.96
Indusind Bank	1487.00	1.1%	21.9%	570.02	LTIMINDTREE LIMITED	5470.35	-1.5%	25.3%	137.95
Eicher Motors	3875.00	1.1%	20.1%	297.54	Larsen & Toubro	3051.15	-1.0%	46.3%	462.29
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Hero Motocorp	3568.00	3576.00	-0.2%	608.66	Hdfc Bank	1521.70	1460.25	4.2%	991.00
Bharti Airtel	978.25	981.00	-0.3%	268.00	HUL	2520.00	2393.00	5.3%	257.70
Hcl Technologies	1328.10	1336.00	-0.6%	173.90	Kotak Mahindra Bank	1739.85	1643.50	5.9%	493.74
Bharat Petroleum	411.05	413.50	-0.6%	330.12	UPL	565.95	528.15	7.2%	71.85
Tata Consumer products ltd.	934.70	940.85	-0.7%	84.54	Reliance Industries	2393.90	2180.00	9.8%	1021.98

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Bamburi Cement Limited	34.95	8.9%	11.0%	0.98	Kenya Reinsurance Corporation Ltd	1.75	-2.8%	-4.4%	0.11
Kenya Power & Lighting Limited	1.48	7.2%	-5.1%	0.62	WPP Scangroup Plc	2.23	-2.6%	-25.9%	0.00
Total Kenya Ltd	16.70	5.4%	-30.0%	0.01	KCB Group Plc	20.35	-1.9%	-46.6%	54.11
Stanbic Holdings	105.00	2.9%	2.9%	0.01	Centum Investment Company Plc	8.50	-0.9%	1.7%	4.07
Nairobi Securities Exchange Plc	6.00	1.7%	-11.5%	0.01	Safaricom Plc	13.60	-0.7%	-43.7%	12.04
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	159.50	171.00	-6.7%	0.85	WPP Scangroup Plc	2.23	2.23	0.0%	0.00
Absa Bank Kenya	11.40	12.95	-12.0%	1.60	British American Tobacco Kenya Ltd	410.00	400.00	2.5%	4.47
Bamburi Cement Limited	34.95	39.80	-12.2%	0.98	East African Breweries Limited	114.00	110.00	3.6%	69.14
NCBA Group Plc	35.90	41.70	-13.9%	0.78	Diamond Trust Bank Limited	46.00	44.00	4.5%	0.03
Nation Media Group	20.00	23.90	-16.3%	4.27	Total Kenya Ltd	16.70	15.80	5.7%	0.01

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Omran Industrial & Trading Co	39.00	5.4%	-45.0%	11.01	Al-Baha Investment and Development Co.	0.14	-6.7%	-98.8%	1.21
Zamil Industrial Investment Co.	20.94	4.0%	31.7%	45.12	United Cooperative Assurance Co.	9.31	-3.8%	29.3%	5.32
Maharah Human Resources Co.	60.80	3.6%	18.1%	53.38	Al-Jouf Agricultural Development Co.	43.75	-3.5%	-1.5%	5.14
Saudi Research and Marketing Group	150.40	3.4%	-17.4%	76.38	Almunajem Foods Co.	67.20	-2.9%	9.4%	15.49
Anaam International Holding Group	0.91	3.4%	-95.6%	14.11	Thob Al Aseel Co.	4.81	-2.8%	-87.3%	11.06
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.	121.00	121.00	0.0%	17.11	Abdullah Al Othaim Markets Co.	12.86	12.86	0.0%	5.77
Saudi Aramco Base Oil Co.	137.60	137.60	0.0%	24.17	Abdulmohsen Alhokair Group for Tourism and Development	2.12	2.12	0.0%	3.79
Arabian Drilling Co.	180.00	180.00	0.0%	21.28	Advanced Petrochemical Co.	37.55	37.55	0.0%	18.39
Power & Water Utility Co for Jubail & Yanbu	57.70	57.70	0.0%	48.29	Al Kathiri Holding Co.	2.52	2.52	0.0%	6.91
Riyadh Cables Group Co.	75.90	75.90	0.0%	34.78	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)
Impala Platinum Holdings Ltd	8179.00	8.3%	-61.6%	34106.43	AngloGold Ashanti Ltd	31317.00	-4.6%	-4.9%	46975.50
Mr Price Group Ltd	16055.00	8.1%	1.0%	59724.60	Gold Fields Ltd	24846.00	-4.1%	41.1%	21751.18
Northam Platinum Holdings Ltd	12045.00	6.0%	-35.7%	16140.30	Sibanye Stillwater Ltd	1991.00	-1.2%	-93.9%	48202.11
Anglo American Platinum Ltd	73815.00	5.4%	-48.2%	37857.50	Reinet Investments SCA	44564.00	-0.9%	180.4%	6907.87
MTN Group Ltd	10170.00	4.4%	-20.1%	38951.10	Capitec Bank Holdings Ltd	196274.00	-0.5%	1134.9%	35767.01
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	117766.00	118650.00	-0.7%	45904.01	Mondi PLC	31850.00	31781.00	0.2%	14317.21
Aspen Pharmacare Holdings Ltd	17894.00	18031.00	-0.8%	7658.10	Sasol Ltd	21410.00	21264.00	0.7%	49457.10
Remgro Ltd	14499.00	14660.00	-1.1%	4228.05	Anglo American PLC	53050.00	52695.00	0.7%	61007.50
Bid Corp Ltd	40925.00	41793.00	-2.1%	29200.81	Nedbank Group Ltd	21146.00	20811.00	1.6%	32776.30
Reinet Investments SCA	44564.00	45590.00	-2.3%	6907.87	Growthpoint Properties Ltd	1047.00	1029.00	1.7%	18154.98

Vietnam

Top 5 Gainers*	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
					Mobile World Inv. Corp	37300.00	-6.3%	-13.1%	318.158,23
					Saigon Securities Inc	30900.00	-6.1%	74.6%	875.254,27
					Hoa Phat Group JSC	25850.00	-5.0%	43.6%	578.451,27
					Vietnam Rubber Group JSC	19300.00	-4.2%	39.9%	55.447,76
					Saigon-Hanoi Commercial Bank	10950.00	-3.1%	29.9%	172.711,55
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	90800.00	97944.43	-7.3%	200.315,28	BaoViet Holdings	40500.00	40500.00	0.0%	11.964,09
Vietcombank	85500.00	96000.00	-10.9%	55.796,47	Petrovietnam Gas	77000.00	77000.00	0.0%	47.840,39
Bank for Inv. and Devp	43000.00	49950.00	-13.9%	32.869,72	Masan Group Corp	63300.00	63300.00	0.0%	102.592,51
Saigon-Hanoi Commercial Bank	10950.00	13600.00	-19.5%	172.711,55	Mobile World Inv. Corp	37300.00	37300.00	0.0%	318.158,23
Vinamilk	68700.00	87004.15	-21.0%	112.335,49	Saigon Beer Alcohol Beverage Corp.	60400.00	60400.00	0.0%	38.485,10

*No gainers on 23/11

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