



Daily Market Report

6 December 2023

ISE

JSE All-Share Index declined by 0.96% and closed at 75,215.49 points on Tuesday, as the Resources and Industrial sectors recorded losses.

RRVM

BRVM Composite Index inched up by 0.03% and closed at 209.62 points on Tuesday, with Bank of Africa - Mali and Bank of Africa - Senegal being the top gainers.

NSE

NGX All-Share Index increased by 0.43% to close at 71,250.17 on Tuesday, as the Industrial, Banking, and Consumer Goods sectors recorded gains.

FGY

EGX 30 Index decreased by 0.54% and closed at 25,127.91 points on Tuesday, as the market lost LE 6 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index increased by 0.06% to close at 867.44 points on Tuesday.

Capital Markets		
JSE Johannesburg Stock Exchange	•	0.96%
BRVM Bourse Régionale des Valeurs Mobilières	A	0.03%
NGX Nigerian Stock Exchange	A	0.43%
EGX Egyptian Stock Exchange	•	0.54%
ESG Casablanca Stock Exchange	A	0.06%

African Markets

Nigeria: NGX 30 Index increased by 0.43% to close at 2,620.33 points on Tuesday. FBNH and Access were the top gainers.

Egypt: EGX 30 Index decreased by 0.54% and closed at 25,127.91 points on Tuesday, as the market lost LE 6 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.82% and closed at 1,510.92 points on Tuesday. Bamburi Cement Limited and NCBA Group Plc were the top gainers.

South Africa: JSE Top 40 Index dropped by 1.11% and closed at 69,134.63 points on Tuesday, as the Resources and Industrial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	27.33%
Exchange Rate (I&E window)	₩ 806.73
INTERBANK RATES OPR	15.55 ▼
Overnight	16.00 ▼

Other Emerging Markets

Abu Dhabi: ADX Index decreased by 0.20% to close at 9,520.07 points on Tuesday, as losses in the Health Care, Real Estate, and Energy pushed shares lower. MSCI UAE inched down by 0.08% to close at 394.82 points.

Vietnam: VN-30 Index declined by 0.61% to close at 1,100.42 points on Tuesday, as blue-chip companies recorded losses. MSCI Vietnam declined by 0.74% to close at 658.07 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.42% to close at 11,143.83 points on Tuesday, as losses in the Banks, Retailing, and Commercial & Professional Svc sectors pushed shares lower. MSCI Saudi Arabia decreased by 0.46% and closed at 1,433.85 points.

India: Nifty 50 Index increased by 0.81% to close at 20,855.10 points on Tuesday, as gains in the Bank, Oil & Gas, and Realty sectors led shares higher. MSCI India increased by 0.78% to close at 2,381.55 points.

News

Nigeria:

Devaluation: External reserves fall \$1.65bn in six months

Operators rally FG for \$2bn coffee industry growth

Power, finance ministries get N618bn multilateral loan, CSOs kick

Kenya

Kenya, India Sign 5 MoU to Enhance Relations Cost of Loans to Rise as CBK Rate Changes to 12.50 per cent

Weak shilling adds Sh809bn to Kenya external debt

Abu Dhabi:

Iberdrola and Masdar to invest \$16bn in green energy

UAE's ADQ announces co-investment platform with Kazakhstan's QIC

UAE's banking entities commit over \$270bn in sustainable finance

Saudi Arabia:

Saudi Arabia, UK ink deal to strengthen marine environmental protection

PIF spearheads energy transition with \$8.5bn green bond proceeds in 12 months: Moody's Riyadh, Doha sign multiple deals across various sectors

Egypt:

\$50m investment fuels green energy industrial complex in SCZONE

Beltone secures landmark EGP 200m factoring deal with EGMED

SCZONE to establish green energy industrial complex

South Africa:

PayProp and Reapit team up to develop proptech platform

Transnet accelerates Durban port deepening project as backlog eases

EVs: SA to focus on production and exports before domestic sales

India:

With \$504 billion reserves, LIC 4th largest insurer

Adani Green raises \$1.4 billion loan for largest renewables park

FedEx invests \$100m in first global ACC in Hyderabad

Vietnam:

Bain Capital adds 50 million USD into Masan Group

Bac Giang, RoK's Chungcheongnam province sign cooperation agreement

Vietnamese, Indian firms seek to boost cooperation in electricals, electronics

Indices and FX Data									
Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,520.07	-0.2%	-0.2%	-0.4%	-6.8%	AED/USD	3.67	0.0%	0.0%
Egypt	25,127.91	-0.5%	1.6%	1.6%	72.1%	EGP/USD	30.80	-0.4%	24.7%
India	20,855.10	0.8%	2.9%	3.6%	15.2%	INR/USD	83.32	-0.1%	0.7%
Kenya	1,510.92	0.8%	1.1%	1.0%	-9.9%	KES/USD	153.30	0.0%	24.1%
Nigeria	2,620.33	0.4%	-0.2%	-0.2%	42.2%	NGN/USD	806.73	-3.8%	42.8%
Saudi Arabia	11,143.83	-0.4%	-0.3%	-0.3%	6.3%	SAR/USD	3.75	0.0%	-0.2%
South Africa	69,134.63	-1.1%	-1.0%	-0.7%	3.3%	ZAR/USD	18.97	0.8%	11.4%
Vietnam	1,100.42	-0.6%	0.9%	1.7%	9.5%	VND/USD	24,271.00	0.1%	2.7%
MSCI Emerging Market	s								
MSCI Frontier	495.38	-0.2%	0.5%	0.6%	4.9%	Brent Crude (\$)	77.20	-1.1%	-10.1%
MSCI Frontier 100	1,136.35	-0.1%	0.5%	0.8%	4.2%	Gold (\$)	2,036.30	-0.3%	11.5%
MSCI Emerging	972.03	-0.8%	-1.0%	-1.5%	1.6%	Copper (\$)	8,334.50	-1.3%	-0.4%
MSCI World (USD)	3,023.22	-0.1%	-0.6%	-0.01%	16.2%	Coffee (\$)	166.36	-2.0%	6.5%

OCKS									
Nigeria									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn 🏝
FBNH	26.75	9.9%	145.4%	331.54	Airtel Africa	1763.00	-2.1%	7.8%	2120.1
Access	19.35	6.3%	127.6%	377.90	FCMB	6.80	-1.4%	76.6%	59.2
UACN	16.00	4.9%	56.1%	947.41					
BUA Cement	98.00	4.7%	0.3%	23.91					
P Z Cussons	23.30	1.7%	105.3%	10.10					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn N
FCMB	6.80	6.80	0.0%	59.22	Сар	20.10	15.25	31.8%	0.9
Zenith	34.90	34.90	0.0%	538.73	Unilever	14.90	10.50	41.9%	7.3
Wema	5.23	5.23	0.0%	26.91	UBN	6.80	4.65	46.2%	2.8
UBA	21.30	21.30	0.0%	1240.78	Nestle	1150.00	764.90	50.3%	17.9
UACN	16.00	16.00	0.0%	947.41	Nigerian Breweries	37.05	24.40	51.8%	24.0
Abu Dhabi									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Fujairah Cement Industries	0.45	13.6%	-6.8%	0.01	Insurance House	0.77	-9.9%	0.4%	0.00
Gulf Cement Co.	0.46	3.8%	-10.8%	0.04	Umm Al Qaiwain General Investment Co. P.S.C	1.06	-7.8%	-10.2%	0.01
Alpha Dhabi Holding PJSC	19.40	1.4%	-28.4%	80.41	GHITHA HOLDING	39.28	-5.9%	-46.2%	12.03
National Bank of Umm Al Qaiwain	1.80	1.1%	0.6%	0.74	Abu Dhabi National Co. for Building Materials	0.24	-5.6%	29.0%	0.01
Abu Dhabi Ship Building Co.	3.85	1.1%	-6.1%	0.28	FOODCO NATIONAL FOODSTUFF PrJSC	1.80	-5.3%	-28.6%	0.01
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	Fertiglobe plc	2.98	2.98	0.0%	32.19
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Sudatel Telecom Group Co Ltd	0.28	0.28	0.0%	0.01
Invest Bank	0.00	0.00	0.0%	0.00	ANAN INVESTMENT HOLDING P.J.S.C	4.07	4.07	0.0%	0.00
The National Investor PRJSC	0.41	0.41	0.0%	0.00	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£)
ELSWEDY ELECTRIC	28.77	3.6%	139.8%	128.21	GB AUTO	8.65	-3.8%	61.4%	45.31
Oriental Weavers	18.90	3.3%	81.7%	27.39	Orascom Development Egypt	12.85	-3.8%	82.8%	51.42
Heliopolis Housing	11.36	3.1%	42.7%	214.37	B Investments Holding	20.05	-2.8%	21.0%	48.45
E-finance For Digital and Financial Investments	20.00	3.1%	5.2%	83.40	Ezz Steel	74.00	-2.6%	218.3%	50.17
QALA For Financial Investments	3.13	2.0%	50.5%	423.97	T M G Holding	23.69	-2.5%	137.1%	21.87
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	37.42	37.42	0.0%	100.07	Cairo For Investment And Real Estate Development	13.14	9.51	38.2%	0.43
T M G Holding	23.69	23.69	0.0%	21.87	Madinet Masr For Housing and Development	4.37	2.46	77.6%	47.65
Sidi Kerir Petrochemicals - SIDPEC	29.05	29.05	0.0%	12.00	E-finance For Digital and Financial Investments	20.00	11.25	77.8%	83.40
QALA For Financial Investments	3.13	3.13	0.0%	423.97	B Investments Holding	20.05	10.42	92.4%	48.45
Palm Hills Development Company	3.07	3.07	0.0%	61.96	Fawry For Banking Technology And Electronic Payment	5.61	2.77	102.5%	81.90
India									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Enterprises Limited	2971.00	17.4%	-23.0%	6415.64	LTIMINDTREE	5492.05	-1.5%	25.8%	147.33
					LIMITED				
Adani Ports And Sez.	1010.00	15.0%	23.5%	4503.48	HUL Divi's Laboratories	2563.00	-1.5%	0.1%	802.90
Power Grid Corp Of India	223.05	4.8%	4.4%	887.22	Limited	3743.60	-1.4%	9.7%	169.15
NTPC State Bank Of India	286.30 608.25	4.2% 2.3%	72.0% -0.9%	529.54 2209.02	Hcl Technologies Bajaj Auto	1319.70 6139.20	-1.4% -1.0%	27.0% 69.8%	517.42 347.41
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w	Last Price	52w L	% Change	Val (mn ₹)
				<u> </u>	Low				
Titan Company	3549.00	3550.00	-0.03%	251.71	HUL	2563.00	2393.00	7.1%	802.90
NTPC	286.30	286.55	-0.1%	529.54	UPL	581.70	528.15	10.1%	108.59
Power Grid Corp Of India	223.05	223.25	-0.1%	887.22	Hdfc Bank	1622.00	1460.25	11.1%	4246.55
Sun Pharma Industries	1242.00	1243.60	-0.1%	114.80	Kotak Mahindra Bank	1827.00	1643.50	11.2%	1016.56
Nestle India Limited	24640.00	24745.00	-0.4%	164.97	Reliance Industries	2437.15	2180.00	11.8%	1545.65
Kenya		4.704							
Top 5 Gainers	Last Price	1d%		Value (mn KSh)	Top 5 Losers	Last Price	1d%		al (mn KSh)
Bamburi Cement Limited	39.50	8.4%	25.4%	2.16	Kengen Limited	2.06	-5.1%	-36.0%	1.87
NCBA Group Plc	39.45	3.4%	0.3%	0.59	WPP Scangroup Plc Equity Group	2.13	-1.8%	-29.2%	0.00
Safaricom Plc Standard Chartered Bank Kenya	14.80	2.1%	-38.7%	118.98	Holdings Plc	37.65	-0.9%	-15.4%	0.92
Ltd	164.50	2.0%	15.2%	2.25	Absa Bank Kenya	11.10	-0.9%	-9.8%	1.09
Centum Investment Company Plc	8.46	1.9%	1.2%	0.33	British American Tobacco Kenya Ltd	406.75	-0.8%	-11.6%	0.20
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)
Bamburi Cement Limited	39.50	39.80	-0.8%	2.16	British American Tobacco Kenya Ltd	406.75	400.00	1.7%	0.20
Standard Chartered Bank Kenya Ltd	164.50	171.00	-3.8%	2.25	East African Breweries Limited	112.00	110.00	1.8%	1.60
NCBA Group Plc	39.45	41.70	-5.4%	0.59	Diamond Trust Bank Limited	45.20	44.00	2.7%	0.02
Absa Bank Kenya	11.10	12.95	-14.3%	1.09	Kengen Limited	2.06	2.00	3.0%	1.87
Stanbic Holdings	108.75	129.75	-16.2%	0.24	Total Kenya Ltd	16.50	15.80	4.4%	0.01



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Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD% Val (1	mn SAR)
Saudi Enaya Cooperative Insurance Co.	15.32	9.9%	70.6%	62.06	Development Works Food Co.	118.00	-9.8%	-23.3%	92.10
Amana Cooperative Insurance Co.	13.28	8.3%	45.5%	57.56	Naseej International Trading Co	48.30	-7.5%	16.9%	83.21
National Agricultural Development Co.	24.12	6.7%	18.1%	75.52	Americana Restaurants International PLC	3.32	-2.9%	10.7%	66.32
Lumi Rental Co.	102.60	5.2%	1732.1%	92.36	Taiba Investments Co.	26.65	-2.7%	7.2%	16.26
United Cooperative Assurance Co.	9.46	4.7%	31.4%	23.39	Saudi Ceramic Co.	26.60	-2.6%	-6.8%	28.89
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change Val (1	mn SAR)
Stocks near 52 w high Al Mawarid Manpower Co.	Last Price	52w H 123.40	% Change 0.0%			Last Price	52w L	% Change Val (1	mn SAR)
				SAR)	Low Abdullah Al Othaim				
Al Mawarid Manpower Co.	123.40	123.40	0.0%	23.53	Low Abdullah Al Othaim Markets Co. Abdulmohsen Alhokair Group for Tourism and	12.62	12.62	0.0%	13.83
Al Mawarid Manpower Co. Saudi Aramco Base Oil Co.	123.40 137.20	123.40 137.20	0.0%	SAR) 23.53 20.24	Low Abdullah Al Othaim Markets Co. Abdulmohsen Alhokair Group for Tourism and Development Advanced	12.62	12.62	0.0%	13.83

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MultiChoice Group	7049.00	3.2%	-39.9%	12406.24	Impala Platinum Holdings Ltd	6769.00	-5.3%	-68.2%	30392.81
Growthpoint Properties Ltd	1124.00	1.7%	-22.7%	24199.72	Sasol Ltd	19461.00	-3.2%	-27.8%	63053.64
Cie Financiere Richemont SA	239600.00	1.0%	7.4%	40286.34	Anglo American PLC	51400.00	-2.8%	174.6%	30411.32
Shoprite Holdings Ltd	26170.00	0.8%	15.8%	24158.84	Northam Platinum Holdings Ltd	11002.00	-2.6%	656.7%	12542.28
Mondi PLC	34230.00	0.5%	17.6%	29044.16	Exxaro Resources Ltd	18492.00	-2.5%	1171.8%	7706.91
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)
Stocks near 52 w high Anheuser-Busch InBev SA/NV	Last Price 119204.00	52w H 119616.00	% Change	Value (mn R) 16047.24	2	Last Price 21047.00	52w L 21040.00	% Change 0.03%	Val (mn R)
					Low				
Anheuser-Busch InBev SA/NV	119204.00	119616.00	-0.3%	16047.24	Low Nedbank Group Ltd	21047.00	21040.00	0.03%	17990.13
Anheuser-Busch InBev SA/NV Remgro Ltd	119204.00 14576.00	119616.00 14696.00	-0.3% -0.8%	16047.24 11741.70	Low Nedbank Group Ltd Anglo American PLC	21047.00 51400.00	21040.00 51229.00	0.03%	17990.13 30411.32

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn d)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Investment & Industrial Development JS Corp.	63300.00	6.9%	-21.5%	73.333,69	Vinhomes	40500.00	-1.9%	-15.6%	338.833,96
FPT Corp	94800.00	1.3%	23.3%	340.743,26	Vietnam Prosperity	19150.00	-1.8%	7.0%	222.173,73
Vietnam National Petroleum Group	35550.00	0.1%	12.1%	31.613,71	Sai Gon Thuong Tin Commercial	27800.00	-1.4%	23.6%	352.843,42
Mobile World Inv. Corp	40000.00	0.1%	-6.8%	246.967,91	Masan Group Corp	61400.00	-1.3%	-34.0%	88.116,44
					Saigon Beer Alcohol Beverage Corp.	64000.00	-1.1%	-61.7%	25.866,06
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn d)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn
Stocks near 52 w high	Last Price 94800.00	52w H 97944.43	% Change -3.2%	Value (mn d) 340.743,26		Last Price 39800.00	52w L 39800.00	% Change 0.0%	*
					Low				<u>d</u>)
FPT Corp	94800.00	97944.43	-3.2%	340.743,26	Low BaoViet Holdings	39800.00	39800.00	0.0%	11.678,71
FPT Corp Vietcombank	94800.00 85400.00	97944.43 96000.00	-3.2% -11.0%	340.743,26 84.755,46	Low BaoViet Holdings Petrovietnam Gas	39800.00 79000.00	39800.00 79000.00	0.0%	11.678,71 52.521,44

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