

Daily Market Report

27 November 2024

JSE

JSE All-Share Index increased by 0.62% and closed at 85,397.50 points on Tuesday, as the Energy and Consumer Staples sectors recorded gains.

BRVM

BRVM Composite decreased by 0.21% to close at 273.57 points on Tuesday, as the Bank of Africa - Benin and Tractafic Motors Côte d'Ivoire were the top losers.

NSE

NGX All-Share Index inched up by 0.01% and closed at 97,639.88 points on Tuesday, as the Insurance, Industrial, Oil & Gas, and Consumer goods sectors recorded gains.

EGX

EGX 30 Index inched up by 0.05% and closed at 30,284.35 points on Tuesday, amid Egyptian and foreign buying.

ESG

Casablanca ESG 10 Index increased by 0.60% to close at 1,058.19 points on Tuesday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.62%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.21%
NGX Nigerian Stock Exchange	▲ 0.01%
EGX Egyptian Stock Exchange	▲ 0.05%
ESG Casablanca Stock Exchange	▲ 0.60%

African Markets

Nigeria: NGX 30 Index inched up by 0.04% and closed at 3,671.87 points on Tuesday. Lafarge Africa and Flour Mills were the top gainers.

Egypt: EGX 30 Index inched up by 0.05% and closed at 30,284.35 points on Tuesday, amid Egyptian and foreign buying.

Kenya: NSE 20 Index inched up by 0.05% and closed at 1,885.31 points on Tuesday, as NCBA Group and Kenya Power & Lighting were the top gainers.

South Africa: JSE Top 40 increased by 0.62% and closed at 77,006.98 points on Tuesday, as the Energy and Consumer Staples sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	33.88%
Exchange Rate (I&E window)	₦1,659.44
INTERBANK RATES	
OPR	32.00 ▼
Overnight	32.71 ▲

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.67% to close at 9,294.04 points on Tuesday, as gains in the Telecom, Real Estate, Financials, and Industrials sectors pushed the index higher. MSCI UAE rose by 1.81% to close at 423.74 points.

Vietnam: VN-30 Index increased by 0.56% to close at 1,299.22 points on Tuesday, as blue-chip companies recorded gains. MSCI Vietnam increased by 0.55% to close at 410.63 points.

Saudi Arabia: Tadawul All Share decreased by 0.44% to close at 11,736.07 points on Tuesday, as losses in the Real Estate, Energy, Media, and Pharma sectors dragged the index lower. MSCI Saudi Arabia decreased by 0.22% to close at 1,474.39 points.

India: Nifty 50 index decreased by 0.11% to close at 24,194.50 points on Tuesday, as losses in the Auto, Healthcare, and Oil & Gas sectors dragged the index lower. MSCI India inched down by 0.08% to close at 2,561.76 points.

News

Nigeria:

CBN raises interest rate once again by 0.25% to 27.50%
FG signs \$500 mn WB SPIN Project MoU to boost irrigation and hydropower
Nigeria's foreign reserves now \$40.8bn - Cardoso

Kenya:

T-bills keep double digit real returns on falling inflation
AfricInvest group gets special powers at I&M
Family Bank 9-months Profits Up 8% to KSh 2.3bn

Abu Dhabi:

Abu Dhabi Chamber reveals surge in UAE F&B exports as revenues set to hit \$38.3bn
Mubadala Capital to take Canada's CI Financial private in \$3.34bn deal
UAE and Ireland's Continuous Ventures team up to support high-potential tech startups

Saudi Arabia:

Saudi Arabia approves FY2025 budget, forecasts \$27bn deficit
Saudi Arabia, Iraq, and Russia reaffirm OPEC+ production cuts commitment
Saudi Arabia signs over \$9.3bn in deals to boost supply chain resilience

Egypt:

Egypt's central bank withdraws LE 1.135T in liquidity from 26 banks
Egypt & Spain partner for €800k two development projects in Egypt
Egypt, China to launch \$7B agriculture complex in El Wadi El Gedid

South Africa:

Anglo American eyes Amplats demerger after R88bn windfall from coal assets disposal
FirstRand upbeat over performance guidance despite headwinds
FNB/BER building confidence index steady at 40 points in fourth quarter

India:

RBI injects ₹6,956 crore as liquidity turns to deficit
India red-flags non-tariff barriers, wants EU focus on market access
FPIs back on D-St, turn net buyers after 2 months
Vietnam:
Telecoms service providers invest in 4G, 5G technologies
Binh Duong speeds up public investment disbursement to boost growth
Việt Nam's pepper exports surpass \$1 billion in first 10 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	9,294.04	0.7%	0.7%	-0.4%	-3.0%	AED/USD	3.67	0.0%	0.0%
Egypt	30,284.35	0.05%	-1.1%	-1.2%	22.0%	EGP/USD	49.62	0.02%	60.2%
India	24,194.50	-0.1%	1.2%	-0.04%	11.3%	INR/USD	84.34	-0.05%	1.3%
Kenya	1,885.31	0.05%	-0.3%	-1.1%	25.6%	KES/USD	129.50	0.0%	-17.5%
Nigeria	3,671.87	0.04%	-0.3%	0.1%	31.6%	NGN/USD	1,659.44	-1.0%	82.9%
Saudi Arabia	11,736.07	-0.4%	-0.9%	-2.4%	-1.9%	SAR/USD	3.76	0.05%	0.2%
South Africa	77,006.98	0.6%	-0.2%	-0.4%	9.2%	ZAR/USD	18.20	0.7%	-0.6%
Vietnam	1,299.22	0.6%	1.0%	-2.9%	14.8%	VND/USD	25,415.00	-0.02%	4.8%

MSCI Emerging Markets

MSCI Frontier	531.63	0.4%	0.5%	-1.1%	4.9%	Brent Crude (\$)	72.32	-0.2%	-6.1%
MSCI Frontier 100	1,150.03	0.5%	0.5%	-0.7%	-0.8%	Gold (\$)	2,646.30	0.1%	27.7%
MSCI Emerging	1,086.93	-0.5%	-0.03%	-2.9%	6.2%	Copper (\$)	9,000.50	-0.5%	5.2%
MSCI World (USD)	3,790.31	0.2%	0.6%	3.9%	19.6%	Coffee (\$)	291.93	1.5%	65.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	57.85	9.2%	83.7%	978.68	Guinness	62.00	-4.6%	-6.1%	323.19
Nascon	30.50	5.2%	-43.3%	75.79	Fidelity	15.60	-2.2%	43.8%	135.46
UACN	22.00	3.3%	71.2%	9.04	Sterling	4.74	-2.1%	10.5%	30.27
Flour Mills	81.20	2.1%	145.7%	224.45	Access	22.60	-1.7%	-2.4%	308.78
Zenith	43.50	0.9%	12.5%	154.94	UBA	31.85	-1.5%	24.2%	947.31
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Geregu Power	1150.00	1150.00	0.0%	1.47	Nigerian Breweries	28.50	24.40	16.8%	3.29
BUA Foods	394.90	394.90	0.0%	0.95	International Breweries	4.05	2.70	50.0%	6.35
FCMB	9.25	9.25	0.0%	7.85	MTNN	170.00	94.20	80.5%	781.71
Zenith	43.50	43.50	0.0%	154.94	Stanbic IBTC	54.00	24.50	120.4%	51.23
Wema	8.95	8.95	0.0%	19.24	Cap	37.50	15.25	145.9%	0.22

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Takaful Co.	5.69	15.0%	-5.2%	0.36	AL KHALEEJ Investment	4.01	-9.9%	93.7%	0.74
ESG EMIRATES STALLIONS GROUP	8.25	14.9%	-7.3%	8.84	GHITHA HOLDING .	22.90	-4.7%	-46.0%	13.53
HILY HOLDING PJSC	3.00	11.5%	-7.1%	0.00	Lulu Retail Holdings	1.82	-4.2%	-10.8%	49.50
National Bank of Fujairah	3.99	10.8%	-20.2%	0.04	Americana Restaurants International PLC	2.16	-3.1%	-31.0%	19.48
PALMS SPORTS PrJSC	9.75	6.9%	-25.0%	27.10	ADNOC Drilling Company PJSC	5.43	-3.0%	43.7%	49.40
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 Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	MBME GROUP	10.78	10.78	0.0%	0.00
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
Gulf Investment House Company	4.50	4.50	0.0%	0.00	Foodco National Foodstuff PrJSC	1.03	1.03	0.0%	0.00
Invest Bank	0.45	0.45	0.0%	0.00	Sawaeed Holding	6.78	6.78	0.0%	0.00
Methaq Takaful Insurance Compnay	0.65	0.65	0.0%	0.00	United Fidelity Insurance Company	1.60	1.60	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£)
Telecom Egypt	33.11	2.2%	-12.1%	34.42	Alexandria Containers and goods	21.44	-6.9%	-57.8%	14.56
Sidi Kerir Petrochemicals	20.55	1.7%	-29.3%	46.02	Ezz Steel	113.00	-2.4%	22.8%	61.03
Eastern Company	27.44	1.6%	-3.4%	17.31	Edita Food Industries S.A.E	28.40	-2.3%	-8.9%	44.60
Abu Dhabi Islamic Bank- Egypt	43.14	1.0%	7.9%	21.49	Oriental Weavers	25.40	-1.6%	50.2%	32.52
Commercial International Bank (Egypt)	80.00	1.0%	10.1%	98.25	Juhayna Food Industries	32.49	-1.2%	107.3%	6.34
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£)
Misir Fertilizers Production Company - Mopco	40.40	40.40	0.0%	27.05	Egyptian Kuwaiti Holding-EGP	33.17	33.00	0.5%	3.76
Juhayna Food Industries	32.49	32.49	0.0%	6.34	Alexandria Mineral Oils Company	7.74	6.95	11.4%	7.59
Ezz Steel	113.00	113.00	0.0%	61.03	Sidi Kerir Petrochemicals	20.55	17.50	17.4%	46.02
ELSWEDY ELECTRIC	89.50	89.50	0.0%	13.69	Belton Financial Holding	2.85	2.38	19.7%	53.27
Commercial International Bank (Egypt)	80.00	80.00	0.0%	98.25	Heliopolis Housing	9.61	7.95	20.9%	21.06

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Shriram Finance Limited	3044.00	3.3%	48.2%	611.83	Adani Enterprises Limited	2166.85	-4.0%	-23.9%	1691.08
Britannia Inds.	5012.00	2.2%	-6.1%	156.44	Adani Ports And Sez.	1131.50	-3.0%	10.5%	660.41
Asian Paints	2505.70	1.9%	-26.4%	288.29	Ultratech Cement	11110.85	-3.0%	5.8%	272.84
Bharat Electronics Limited	297.80	1.9%	62.4%	816.37	Bajaj Auto	9151.00	-2.9%	34.6%	691.37
Infosys	1920.20	1.6%	24.5%	1319.65	Sun Pharma Industries	1763.35	-2.0%	40.0%	280.90
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Wipro	588.30	590.35	-0.3%	461.63	Asian Paints	2505.70	2422.95	3.4%	288.29
Tech Mahindra	1746.50	1767.80	-1.2%	225.82	Indusind Bank	1009.50	966.40	4.5%	241.11
Hdfc Bank	1786.40	1810.00	-1.3%	2760.60	Nestle India Limited	2268.00	2168.70	4.6%	71.92
Eicher Motors	4947.00	5105.00	-3.1%	277.81	Tata Consumer products Ltd.	963.45	900.50	7.0%	61.35
Infosys	1920.20	1991.45	-3.6%	1319.65	Adani Enterprises Limited	2166.85	2025.00	7.0%	1691.08

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	43.05	6.4%	10.5%	0.73	KCB Group Plc	38.10	-2.8%	74.0%	13.14
Kenya Power & Lighting Limited	4.37	1.6%	207.7%	2.77	Equity Group Holdings Plc	44.50	-2.3%	32.2%	171.94
Centum Investment Company Plc	9.68	0.4%	15.2%	0.39	Bamburi Cement	64.00	-1.5%	78.5%	0.40
Standard Chartered Bank Kenya Ltd	241.25	0.1%	48.9%	0.92	Safaricom Plc	14.65	-1.3%	5.4%	171.38
					Absa Bank Kenya	15.10	-1.3%	31.9%	0.84
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	241.25	248.00	-2.7%	0.92	Nation Media Group	12.20	12.05	1.2%	0.50
KCB Group Plc	38.10	39.50	-3.5%	13.14	Kenya Reinsurance Corporation Ltd	1.15	1.07	7.5%	6.48
Stanbic Holdings	127.25	132.00	-3.6%	28.77	Centum Investment Company Plc	9.68	7.60	27.4%	0.39
NCBA Group Plc	43.05	45.00	-4.3%	0.73	Safaricom Plc	14.65	11.50	27.4%	171.38
The Cooperative Bank of Kenya Ltd	13.90	15.20	-8.6%	5.53	BK Group Plc	33.80	26.50	27.5%	0.10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Riyadh Cables Group Co.	128.00	7.6%	38.2%	148.86	Jadwa REIT Saudi Fund	10.38	-5.1%	-23.2%	5.31
MBC Group Co.	50.80	6.8%	56.3%	152.30	Al-Jouf Agricultural Development Co.	58.00	-4.9%	18.4%	15.81
Elm Co.	1105.00	4.0%	35.6%	80.75	Ataa Educational Co.	72.30	-4.2%	0.7%	4.36
Middle East Specialized Cables Co.	38.50	3.5%	72.3%	30.80	Dar Alarkan Real Estate Development Co.	16.40	-4.2%	15.5%	37.13
Al Majed Oud Co.	152.00	2.7%	24.4%	45.10	Rasan Information Technology Co.	73.50	-3.9%	52.8%	39.81
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)
SAL Saudi Logistics Services Co.	259.00	259.00	0.0%	31.23	Abdullah Al Othaim Markets Co.	10.96	10.96	0.0%	9.81
Jamjoom Pharmaceuticals Factory Co.	154.00	154.00	0.0%	8.68	Abdulmohsen Alhokair Group for Tourism and Development	2.47	2.47	0.0%	3.44
Al Mawarid Manpower Co.	104.20	104.20	0.0%	4.14	Advanced Petrochemical Co.	34.10	34.10	0.0%	10.05
Power & Water Utility Co for Jubail & Yanbu	56.00	56.00	0.0%	14.48	Al Kathiri Holding Co.	2.58	2.58	0.0%	6.37
Riyadh Cables Group Co.	128.00	128.00	0.0%	148.86	Al-Baha Investment and Development Co.	0.31	0.31	0.0%	49.16

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	10512.00	3.8%	22.9%	45832.32	Woolworths Holdings Ltd	6349.00	-5.6%	24.2%	36506.75
Exxaro Resources Ltd	17550.00	3.4%	2.1%	22464.00	Sasol Ltd	9295.00	-1.7%	14.9%	23051.60
Cie Financiere Richemont SA	252071.00	2.4%	-10.5%	28058.02	Anheuser-Busch InBev SA/NV	98414.00	-1.7%	-39.5%	54849.07
Northam Platinum Holdings Ltd	11439.00	2.3%	-19.9%	32372.37	Investec Ltd	13037.00	-1.4%	26.3%	12385.15
Absa Group Ltd	17411.00	2.2%	21.5%	49447.24	BHP Group Ltd	46699.00	-1.3%	2.2%	24518.38
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)
Standard Bank Group Ltd	24088.00	24088.00	0.0%	58774.72	Anheuser-Busch InBev SA/NV	98414.00	98414.00	0.0%	54849.07
Shoprite Holdings Ltd	30200.00	30200.00	0.0%	17910.41	BHP Group Ltd	46699.00	46699.00	0.0%	24518.38
Sanlam Ltd	8897.00	8897.00	0.0%	17616.06	Mondi PLC	27322.00	27322.00	0.0%	10743.01
Prosus NV	72761.00	72761.00	0.0%	25068.35	MTN Group Ltd	8129.00	8129.00	0.0%	33166.32
NEPI Rockcastle NV	14033.00	14033.00	0.0%	11543.83	Sasol Ltd	9295.00	9295.00	0.0%	23051.60

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Mobile World Inv. Corp	60000.00	1.7%	40.2%	261116.94	Vinhomes	42400.00	-0.7%	-1.9%	183743.07
PetroVietnam Power Corp	12350.00	1.7%	9.8%	135189.94	Vietnam National Petroleum Group	39250.00	-0.4%	13.8%	20560.53
Bank for Inv. and Devp	46250.00	1.5%	6.6%	84575.86					
Ho Chi Minh City Devp	25050.00	1.4%	23.4%	163392.29					
Vietnam Rubber Group JSC	31300.00	1.3%	47.6%	86720.30					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
FPT Corp	135200.00	135200.00	0.0%	562870.55	BaoViet Holdings	44250.00	44250.00	0.0%	9676.31
Vietcombank	92400.00	96000.00	-3.8%	163041.24	Petrovietnam Gas	69600.00	69600.00	0.0%	31217.94
Bank for Inv. and Devp	46250.00	49950.00	-7.4%	84575.86	Saigon Beer Alcohol Beverage Corp.	56100.00	56100.00	0.0%	40247.25
Vietnam JSC Bank	35300.00	38200.00	-7.6%	159654.22	Southeast Asia Commercial JS Bank	16900.00	16900.00	0.0%	31087.31
Ho Chi Minh City Devp	25050.00	27160.00	-7.8%	163392.29	Techcombank	23550.00	23550.00	0.0%	159335.05

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