

Daily Market Report

15 March 2021

JSE

JSE All-Share Index fell 0.82% and closed at 68,209.88 points on Friday, as the Resources and Gold mining sectors recorded losses.

BRVM

BRVM Composite Index closed at 138.33 points, down by 0.95% on Friday, with BICI Côte d'Ivoire and Nsia Banque Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index decreased by 0.13% and closed at 38,648.48 points on Friday, as the Oil & Gas and Banking sectors recorded losses.

EGX

EGX 30 Index increased by 0.25% and closed at 11,289.57 points on Sunday, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index closed at 862.81 points on Friday, as it increased by 0.79%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.82%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.95%
NSE Nigerian Stock Exchange	▼ 0.13%
EGX Egyptian Stock Exchange	▲ 0.25%
ESG Casablanca Stock Exchange	▲ 0.79%

African Markets

Nigeria: NSE 30 decreased by 0.23% and closed at 1,535.59 points on Friday. Julius Berger and MTNN were the top losers.

Egypt: EGX 30 Index increased by 0.25% and closed at 11,289.57 points on Sunday, amid Arab and foreign buying.

Kenya: NSE 20 Index increased by 0.51% and closed at 1,923.04 points on Friday. Nation Media Group and Total Kenya were the top gainers.

South Africa: JSE Top 40 Index decreased 0.95% and closed at 62,587.78 points on Friday, as the Resources and Gold mining sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	16.47%
Exchange Rate	₦ 379.00
INTERBANK RATES	
OBB	13.33 ▼
Overnight	14.17 ▼

Other Emerging Markets

Abu Dhabi: ADX General Index vaulted 0.84% to close at 5,683.96 points on Sunday, as First Abu Dhabi Bank and Aldar Properties recorded gains. MSCI UAE Index remained unchanged at 346.61 points.

Vietnam: VN-30 Index edged 0.08% down to close at 1,187.81 points on Friday, as blue-chip stocks recorded losses. MSCI Vietnam Index declined 0.10% to close at 913.17 points.

Saudi Arabia: Tadawul All Share Index climbed 0.80% to close at 9,664.61 points on Sunday, as gains in the Hotels & Tourism, Building & Construction and Industrial Investment sectors led shares higher. MSCI Tadawul 30 Index rose 0.68% to close at 1,306.26 points.

India: Nifty 50 Index fell 0.95% to close at 15,030.95 points on Friday, as losses in the Auto, Banking and Green Energy sectors pushed shares lower. MSCI India Index dropped 1.02% to close at 1,710.38 points.

News

Nigeria:

FMDQ Admits N53.2bn Bonds of Fidelity Bank, TSL SPV
2,799 workers change pension firms, move N18.89bn
MTN Nigeria Series III and IV Commercial Paper Issuance Now Open

Kenya:

Uhuru extends Covid curbs as Kenya grapples with spike
Petrol Prices Hit Ksh 122.8 Following a Leap in March Pump Prices
KCB, Huawei to Unveil New Mobile Banking Product

Page 1 of 4

Abu Dhabi:

UAE set to finalise 10-year plan to boost cultural revenues
UAE: Microsoft cloud to generate \$27b revenues, 69k new jobs by 2024
Abu Dhabi giant ADQ develops platform for venture capital push

Saudi Arabia:

Saudi's SABB and Alawwal complete merger process
Sabic extends contract with Tristar Group's JV, United Stars
Alahli Takaful renews insurance deal with NCB for SAR 148m

Egypt:

Banque Misr to acquire 90% of CI Capital
Egypt secures \$443M for railway, environment projects: Int'l coop. min.
EGAS signed 9 agreements worth \$ 981M to explore natural gas

South Africa:

ECONOMIC WEEK AHEAD: Pressure on retail sales in focus
Upbeat Aspen flags return of dividends and eyes acquisitions
BAT South Africa to continue operating plant despite sales loss

India:

Retail inflation rises to 3-month high in February, IIP dips 1.6% in January
FM to infuse Rs 14.5K cr in banks under RBI's prompt corrective action framework
India forex reserves surpass Russia's to become world's 4th biggest

Vietnam:

Vietnamese companies post billions of dollars in revenue
Digital transformation expected to keep Viet Nam M&A market humming
Foxconn to invest \$700 million more in Viet Nam

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,683.96	0.8%	0.8%	0.4%	12.7%	AED/USD	3.67	0.0%	0.0%
Egypt	11,289.57	0.3%	0.3%	-2.0%	4.1%	EGP/USD	15.70	0.0%	-0.2%
India	15,030.95	-0.9%	0.0%	3.5%	7.5%	INR/USD	72.80	-0.2%	-0.4%
Kenya	1,923.04	0.5%	0.0%	0.4%	2.9%	KES/USD	109.65	0.0%	0.4%
Nigeria	1,535.59	-0.2%	0.0%	-3.6%	-6.4%	NGN/USD	409.63	-0.5%	3.8%
Saudi Arabia	9,664.61	0.8%	0.8%	5.7%	11.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,587.78	-0.9%	0.0%	3.0%	15.1%	ZAR/USD	14.97	0.4%	1.9%
Vietnam	1,187.81	-0.1%	0.0%	1.2%	10.9%	VND/USD	23,056.50	0.0%	-0.1%

MSCI Emerging Markets

MSCI Frontier	573.75	0.1%	0.0%	0.0%	0.4%	Brent Crude (\$)	69.70	0.7%	34.3%
MSCI Frontier 100	1,291.15	0.1%	0.0%	0.6%	2.6%	Gold (\$)	1,710.69	-0.7%	-9.9%
MSCI Emerging	1,348.20	-0.7%	0.0%	0.7%	4.4%	Copper (\$)	9,103.50	0.4%	17.5%
MSCI World (USD)	2,807.21	0.0%	0.0%	2.9%	4.4%	Coffee (\$)	121.97	0.9%	2.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Flour Mills	29.70	10.0%	14.2%	60.29	Wema	0.61	-6.2%	-11.6%	7.49
International Breweries	5.30	6.0%	-10.9%	210.69	Transnational Corporation	0.83	-5.7%	-7.8%	45.95
UBA	7.15	2.9%	-17.3%	50.50	Julius Berger	17.00	-4.0%	-4.5%	13.59
Fidelity	2.30	2.7%	-8.7%	10.86	UACN	7.15	-3.4%	-1.4%	5.01
Axamansard	1.00	1.0%	-4.8%	10.55	MTNN	158.00	-1.3%	-7.0%	136.15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Okomu Oil	93.00	93.00	0.0%	9.28	Transcorp Hotels	3.25	3.25	0.0%	0.0
Guinness	23.50	23.50	0.0%	4.73	UBN	5.10	4.65	9.7%	1.54
Airtel Africa	930.00	930.00	0.0%	0.46	Julius Berger	17.00	14.90	14.1%	13.59
Total	142.00	143.00	-0.7%	1.41	Cap	20.00	15.25	31.1%	0.63
Seplat Petroleum	540.00	583.00	-7.4%	24.74	P Z Cussons	5.00	3.80	31.6%	0.89

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 for Building Materials	0.21	14.3%	-19.7%	0.01	Fujairah Building Industries	1.25	-7.4%	-4.6%	0.01
National Bank of Ras Al Khaimah	3.89	5.1%	-0.3%	6.46	Gulf Pharma Ind.	1.22	-6.2%	-8.3%	0.03
RAK Properties PJSC	0.54	3.7%	12.3%	20.24	Methaq Takaful Ins.	0.86	-2.2%	-0.9%	0.54
Al Dar Properties	3.73	2.2%	18.4%	125.96	Bank of Sharjah	0.61	-1.1%	-3.8%	0.05
Abu Dhabi Commercial Bank	6.32	2.1%	1.9%	21.51	Abu Dhabi National Energy	1.37	-0.7%	-4.9%	1.70
Stocks near 52 w high	Last Price	52w H	% Change	Value(mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mnDH)
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.18	Sharjah Insurance	2.11	2.11	0.0%	0.0
The National Investor PRJSC	0.65	0.65	0.0%	0.0	Al Buhaira Ntl Ins.	1.70	1.70	0.0%	0.0
United Fidelity Ins. Co.	2.00	2.00	0.0%	0.0	Insurance House	0.81	0.81	0.0%	0.0
Sharjah Group Co.	0.85	0.85	0.0%	0.0	Al Khazna Ins Co	1.00	1.00	0.0%	0.0
Ras Al Khaimah Poultry	3.75	3.75	0.0%	0.0	Al Ain Ahlia Ins.	33.42	33.42	0.0%	0.0

Egypt

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	38.43	6.8%	47.1%	22.17	CI Capital Holding For Financial Investments	4.29	-7.3%	7.5%	0.11
Orascom Development Egypt	5.96	6.0%	21.6%	15.25	Eastern Company	13.54	-3.1%	3.8%	0.19
Six of October Development & Investment (SODIC)	17.02	4.7%	14.7%	9.48	Alexandria Mineral Oils Company	3.06	-2.5%	-1.9%	4.43
T M G Holding	6.58	1.9%	0.2%	11.90	Orascom Investment Holding	0.31	-2.5%	-44.8%	37.38
Medinet Nasr Housing	3.79	1.1%	-0.8%	7.74	Sidi Kerir Petrochemicals	11.07	-2.1%	18.9%	1.48
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£)
Orascom Development Egypt	5.96	5.96	0.0%	15.25	Credit Agricole Egypt	24.94	24.20	3.1%	0.27
Six of October Development & Investment (SODIC)	17.02	17.17	-0.9%	9.48	Ibnsina Pharma	5.02	4.86	3.3%	9.48
Egyptian Kuwaiti Holding	1.15	1.17	-1.8%	4.34	Orascom Financial Holding	0.33	0.31	8.5%	18.85
Sidi Kerir Petrochemicals	11.07	11.67	-5.1%	1.48	Edita Food Industries S.A.E	8.81	7.76	13.5%	0.42
GB AUTO	3.95	4.19	-5.7%	3.30	Emaar Misr for Development	2.43	2.13	14.1%	0.59

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharat Petroleum	457.55	2.7%	20.1%	12073.500	Bajaj Auto	3746.40	-3.1%	8.8%	4244.08
Indian Oil	101.30	2.5%	11.4%	3550.63	Hindalco Industries	330.20	-3.0%	37.3%	5043.96
Power Grid Corp Of India	220.05	2.3%	15.9%	2242.09	SBI Life Insurance	914.20	-2.8%	1.1%	26605.44
Jsw Steel	418.75	1.1%	8.1%	5678.01	HDFC Life Insurance Company Ltd	710.80	-2.8%	5.1%	2351.16
Titan Company	1482.50	0.8%	-5.4%	3923.03	Maruti Suzuki India	7096.20	-2.4%	-7.2%	6770.11
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Infosys	1374.85	1392.80	-1.3%	13068.37	HUL	2204.75	1757.30	25.5%	4514.90
Grasim Industries	1379.50	1408.00	-2.0%	1676.63	Nestle India Limited	16722.45	12200.00	37.1%	1430.46
UPL	620.30	637.70	-2.7%	3115.04	Coal India	150.50	109.55	37.4%	2243.40
Indian Oil	101.30	105.00	-3.5%	3550.63	Indian Oil	101.30	71.15	42.4%	3550.63
Jsw Steel	418.75	435.00	-3.7%	5678.01	Bharti Airtel	524.20	361.75	44.9%	6023.90

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	19.53	8.0%	26.3%	1.56	Kenya Reinsurance Corporation Ltd	2.60	-3.0%	12.1%	5.49
Total Kenya Ltd	25.00	4.2%	4.2%	0.01	Nairobi Securities Exchange Plc	8.30	-2.4%	1.6%	0.02
NIC Group Plc	24.85	3.1%	-7.0%	0.24	Safaricom Plc	37.08	-1.3%	8.3%	114.74
KCB Group Plc	39.95	1.8%	4.9%	36.40	Kengen Limited	4.61	-0.4%	-2.1%	2.36
Equity Group Holdings Plc	39.99	1.6%	9.4%	25.47	East African Breweries Limited	175.14	-0.2%	13.5%	84.59
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)
British American Tobacco Kenya Ltd	484.41	500.00	-3.1%	1.40	Standard Chartered Bank Kenya Ltd	134.50	134.00	0.4%	1.04
Safaricom Plc	37.08	39.25	-5.5%	114.74	WPP Scangroup Plc	5.42	5.04	7.5%	0.50
East African Breweries Limited	175.14	190.00	-7.8%	84.59	Centum Investment Company Plc	16.61	15.15	9.6%	0.50
The Cooperative Bank of Kenya Ltd	12.97	14.20	-8.7%	1.24	Absa Bank Kenya	9.42	8.50	10.8%	1.72
Total Kenya Ltd	25.00	27.50	-9.1%	0.01	Stanbic Holdings	83.00	72.25	14.9%	0.0

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Arabia Refineries Co.	169.40	10.0%	61.0%	867.69	Red Sea International Co.	29.05	-4.1%	30.7%	71.62
Wafrah for Industry and Development Co.	170.00	10.0%	10.4%	261.09	Saudi Public Transport Co.	27.75	-3.1%	54.7%	209.82
Saudi Advanced Industries Co.	44.75	10.0%	136.8%	959.10	Alandalus Property Co.	22.70	-2.1%	7.2%	12.45
Etihad Atheeb Telecommunication Co.	38.85	9.9%	251.3%	47.98	Takween Advanced Industries Co.	17.18	-1.7%	22.7%	94.20
Tabuk Cement Co.	21.76	9.8%	27.7%	102.19	Batic Investments and Logistics Co.	37.80	-1.6%	8.3%	69.64
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)
Etihad Atheeb Telecommunication Co.	38.85	38.85	0.0%	47.98	Nat. Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Tabuk Cement Co.	21.76	21.76	0.0%	102.19	BinDawood Holding Co.	109.00	105.60	3.2%	24.88
Eastern Province Cement Co.	50.10	50.10	0.0%	32.16	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	72.96
Alinma Bank	18.16	18.16	0.0%	748.76	Bonyan REIT Fund	8.95	7.98	12.2%	1.35
Riyad Bank	22.48	22.48	0.0%	54.73	Saudi Airlines Catering Co.	77.40	68.50	13.0%	36.65

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Discovery Ltd	147.93	4.4%	-3.7%	181.95	Prosus (JSE)	1698.10	-6.1%	5.7%	1348.51
MTN Group	86.88	4.1%	44.3%	1281.83	Naspers Ltd	3449.93	-5.0%	14.3%	7080.83
Mr Price Group	183.42	3.8%	7.5%	273.33	Sibanye Stillwater	67.77	-4.5%	13.0%	1329.38
Shoprite Limited	143.48	3.1%	2.5%	237.65	Gold Fields	138.63	-3.5%	0.8%	428.38
Woolworths Hdq.	52.04	2.8%	31.6%	148.76	Impala Platinum	276.00	-3.0%	36.7%	812.49
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)
Woolworths Hdq.	52.04	52.33	-0.6%	148.76	Brit.Amer.Tobacco (JSE)	552.50	491.11	12.5%	477.93
ABSA Group	134.67	135.95	-0.9%	376.21	Clicks Group	243.16	201.33	20.8%	130.09
Anglo American (JSE)	629.20	640.00	-1.7%	1136.10	Reinet Investments (JSE) SCA	285.52	225.03	26.9%	69.16
MTN Group	86.88	88.48	-1.8%	1281.83	Spar Group	189.60	142.25	33.3%	125.75
Sanlam Limited	64.05	65.54	-2.3%	568.80	Vodacom Group	125.42	90.70	38.3%	289.32

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Thanh Thanh Cong Tay Ninh	23800.00	4.8%	13.6%	310034.90	Petrovietnam Gas	91100.00	-1.7%	5.2%	36640.00
Faros Construction	3630.00	3.7%	43.5%	65268.00	Saigon Securities Inc	33500.00	-1.3%	1.2%	209024.00
Vietnam Prosperity	44500.00	1.7%	36.9%	384282.90	PetroVietnam Fertilizer Chem	18950.00	-1.3%	0.8%	63632.00
Saigon Beer Alcohol	178000.00	1.1%	-8.7%	11672.00	Mobile World Inv. Corp	131100.00	-1.1%	10.3%	54546.00
Ho Chi Minh City Devp	26650.00	0.9%	12.2%	108031.00	No Va Land Invest	82200.00	-0.8%	26.0%	125129.00
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn đ)
Vietnam Prosperity	44500.00	45000.00	-1.1%	384282.90	Vietnam Export Import Commercial	18400.00	14000.00	31.4%	5373.00
Hoa Phat Group JSC	46450.00	47100.00	-1.4%	564116.00	Vietjet Aviation	135000.00	93200.00	44.8%	71296.00
No Va Land Invest	82200.00	83500.00	-1.6%	125129.00	Vinamilk	102200.00	69750.03	46.5%	277920.00
Military Commercial Bank	28250.00	28700.00	-1.6%	462875.90	Bank for Inv. and Devp	43350.00	29500.00	46.9%	110155.00
Techcombank	40050.00	40750.00	-1.7%	322693.10	Vingroup JSC	105900.00	68000.00	55.7%	118694.00

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