

Daily Market Report

16 March 2021

JSE

JSE All-Share Index fell 0.94% and closed at 67,566.42 points on Monday, as the Resources and Financials sectors recorded losses.

BRVM

BRVM Composite Index closed at 138.53 points, up by 0.14% on Monday, with Saph Côte d'Ivoire and SMB Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index decreased by 0.22% and closed at 38,561.84 points on Monday, as the Consumer goods and Banking sectors recorded losses.

EGX

EGX 30 Index decreased by 0.60% and closed at 11,222.33 points on Monday, as the market lost LE 7.85 billion of market cap, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index closed at 864.31 points on Monday, as it increased by 0.17%.

African Markets

Nigeria: NSE 30 decreased by 0.32% and closed at 1,530.63 points on Monday. Nigerian Breweries and International Breweries were the top losers.

Egypt: EGX 30 Index decreased by 0.60% and closed at 11,222.33 points on Monday, as the market lost LE 7.85 billion of market cap, amid Egyptian and foreign selling.

Kenya: NSE 20 Index increased by 0.17% and closed at 1,926.37 points on Monday. Nation Media Group and Bamburi Cement were the top gainers.

South Africa: JSE Top 40 Index decreased 1.07% and closed at 61,921.05 points on Monday, as the Resources and Financials sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 0.94%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.14%

NSE

Nigerian Stock Exchange ▼ 0.22%

EGX

Egyptian Stock Exchange ▼ 0.60%

ESG

Casablanca Stock Exchange ▲ 0.17%

Nigeria Key Indicators

	Current
Inflation	16.47%
Exchange Rate	₦ 379.00
INTERBANK RATES	
OBB	12.50 ▼
Overnight	12.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General Index vaulted 0.42% to close at 5,707.82 points on Monday, as First Abu Dhabi Bank and Etisalat recorded gains. MSCI UAE Index increased 1.32% to close at 351.20 points.

Vietnam: VN-30 Index climbed 0.26% to close at 1,190.86 points on Monday, as blue-chip stocks recorded gains. MSCI Vietnam Index inched up 0.07% to close at 913.77 points.

Saudi Arabia: Tadawul All Share Index slipped 0.20% to close at 9,645.74 points on Monday, as losses in the Financial Services, Media & Publishing and Hotels & Tourism sectors pushed shares lower. MSCI Tadawul 30 Index declined 0.31% to close at 1,302.25 points.

India: Nifty 50 Index fell 0.67% to close at 14,929.50 points on Monday, as losses in the Healthcare, Capital Goods and Banking sectors pushed shares lower. MSCI India Index declined 0.57% to close at 1,700.55 points.

News

Nigeria:

Unemployment rate hits 33.3%, 23.18million Nigerians jobless – NBS
Petrol subsidy to gulp N102.96bn in March
Reps begin FG assets recovery in privatised entities

Kenya:

Equity Group signs KSh 5.5 Billion deal with AGF to support MSMEs
Payment on Sh32 billion restructured Stanbic loans resumes
Tax collection rises 24pc on end of reliefs

Abu Dhabi:

Liquidity of UAE banking system back to pre-COVID-19 levels: central bank
Quarantine concerns hit travel demand to India from UAE
UAE asks listed companies to add at least one woman to board

Saudi Arabia:

Saudi's CMA approves public offering of Albilad Investment Company's fund
Saudi inflation rate falls to 5.2% in Feb, reflects VAT hike for eighth month
Saudi Arabia, Germany sign green hydrogen MoU

Egypt:

CBE launches new mortgage finance initiative for low, middle-income buyers
Remittances from Egyptian expats record \$29.16B during 2020
Egypt's T-bills attract EGP 42 bln in 4 auctions: CBE

South Africa:

Absa holds off on dividend, profits drop 58%
Discovery Life pays R1.5bn in Covid-19 claims
Mr Price to buy South African kitchenware retailer Yuppiefchef

India:

Govt to propose cryptocurrency ban, penalising miners, traders: Report
Govt to sell remaining stake in Delhi, Mumbai, Bangalore, Hyderabad airports
PSU banks' NPAs fall Rs 1L cr in FY21

Vietnam:

German, Vietnamese firms to jointly build water treatment plant in Long An
The Government agrees to greenlight mobile money for two years
Leverage for Vietnam agricultural products to take off

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,707.82	0.4%	1.3%	0.8%	13.1%	AED/USD	3.67	0.0%	0.0%
Egypt	11,222.33	-0.6%	-0.3%	-2.6%	3.5%	EGP/USD	15.70	0.0%	-0.2%
India	14,929.50	-0.7%	-0.7%	2.8%	6.8%	INR/USD	72.47	-0.4%	-0.8%
Kenya	1,926.37	0.2%	0.2%	0.6%	3.1%	KES/USD	109.65	0.0%	0.4%
Nigeria	1,530.63	-0.3%	-0.3%	-3.9%	-6.7%	NGN/USD	410.50	0.2%	4.0%
Saudi Arabia	9,645.74	-0.2%	0.6%	5.5%	11.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,921.05	-1.1%	-1.1%	1.9%	13.9%	ZAR/USD	14.94	-0.2%	1.7%
Vietnam	1,190.86	0.3%	0.3%	1.5%	11.2%	VND/USD	23,082.00	0.1%	0.0%

MSCI Emerging Markets

MSCI Frontier	573.15	-0.1%	-0.1%	-0.1%	0.3%	Brent Crude (\$)	68.35	-1.4%	31.7%
MSCI Frontier 100	1,292.41	0.1%	0.1%	0.7%	2.7%	Gold (\$)	1,729.58	1.1%	-8.9%
MSCI Emerging	1,340.25	-0.6%	-0.6%	0.1%	3.8%	Copper (\$)	9,164.25	0.7%	18.3%
MSCI World (USD)	2,821.85	0.5%	0.5%	3.5%	4.9%	Coffee (\$)	122.03	0.05%	2.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	2.39	3.9%	-5.2%	10.86	Nigerian Breweries	47.00	-5.3%	-16.1%	304.03
FBNH	7.35	3.5%	2.8%	105.30	International Breweries	5.10	-3.8%	-14.3%	210.69
Wema	0.62	1.6%	-10.1%	7.49	P Z Cussons	4.85	-3.0%	-8.5%	0.89
Sterling	1.56	1.3%	-23.5%	2.59	Guaranty	29.95	-2.6%	-7.4%	953.64
Seplat Petroleum	545.00	0.9%	35.5%	24.74	Dangote Sugar	17.55	-2.2%	-0.3%	32.76
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%	0.09
Airtel Africa	930.00	930.00	0.0%	0.17	UBN	5.05	4.65	8.6%	1.54
Total	142.00	143.00	-0.7%	1.41	Julius Berger	17.00	14.90	14.1%	13.59
Guinness	23.00	23.55	-2.3%	4.73	P Z Cussons	4.85	3.80	27.6%	0.89
Seplat Petroleum	545.00	583.00	-6.5%	24.74	Cap	20.00	15.25	31.1%	0.63

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Pharmaceutical Ind.	1.30	6.6%	-2.3%	0.11	Abu Dhabi Nat for Building Materials	0.20	-3.8%	-22.8%	0.00
Abu Dhabi Aviation	4.54	4.6%	25.4%	18.84	Sudatel Telecom	0.38	-3.5%	-7.7%	0.07
Eshraq Investments	0.35	3.3%	8.8%	7.79	Abu Dhabi Ship Building	2.01	-1.5%	-13.7%	2.09
National Marine Dredging	6.88	2.7%	14.5%	7.12	Abu Dhabi National Ins. Co	5.15	-0.8%	1.0%	9.56
Ras Al Khaimah Cement	0.72	2.1%	-8.3%	0.00	Dana Gas PJSC	0.78	-0.8%	9.2%	19.15
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%	0.0	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
Du	7.10	7.10	0.0%	3.79	Insurance House	0.81	0.81	0.0%	0.0
United Fidelity Ins. Co.	2.00	2.00	0.0%	0.0	Al Khazna Ins Co	1.00	1.00	0.0%	0.0
Sharjah Group Co.	0.85	0.85	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£)
GB AUTO	4.07	3.0%	22.6%	23.18	Orascom Financial Holding	0.32	-4.2%	-33.5%	21.01
Eastern Company	13.70	1.2%	5.1%	6.99	Credit Agricole Egypt	24.01	-3.7%	-17.3%	10.53
Egyptian Kuwaiti Holding	1.16	1.0%	14.5%	1.67	Heliopolis Housing	4.99	-3.3%	-18.2%	9.38
Commercial International Bank (Egypt)	61.27	0.7%	3.5%	105.11	Ibnsina Pharma	4.86	-3.2%	-4.5%	24.79
					ELSWEDY ELECTRIC	9.04	-3.0%	-7.8%	12.67
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£)
Egyptian Kuwaiti Holding	1.16	1.17	-0.9%	1.67	Credit Agricole Egypt	24.01	23.04	4.2%	10.53
GB AUTO	4.07	4.19	-2.9%	23.18	Orascom Financial Holding	0.32	0.31	4.3%	21.01
Six of October Development & Investment (SODIC)	16.60	17.40	-4.6%	1.93	Ibnsina Pharma	4.86	4.55	6.8%	24.79
Orascom Development Egypt	5.88	6.23	-5.6%	24.48	Emaar Misr for Development	2.40	2.13	12.7%	4.34
Sidi Kerir Petrochemicals	10.86	11.67	-6.9%	5.94	Edita Food Industries S.A.E	8.81	7.76	13.5%	0.04

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Jsw Steel	429.65	2.6%	11.0%	5678.006	Divi's Laboratories Limited	3411.00	-2.9%	-11.2%	2122.88
Tech Mahindra	1026.65	2.3%	5.5%	4724.88	Hero Motocorp	3264.15	-2.6%	5.0%	3692.23
Tata Steel	736.40	2.3%	14.4%	11768.35	Bajaj Finserv	9689.05	-2.5%	8.8%	4566.35
Power Grid Corp Of India	224.15	1.9%	18.1%	2242.09	Coal India	146.90	-2.4%	8.5%	2243.40
Indusind Bank	1038.65	1.6%	16.1%	5939.02	Gail (India)	143.55	-2.2%	16.5%	2308.64
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Jsw Steel	429.65	435.00	-1.2%	5678.01	HUL	2210.85	1757.30	25.8%	4514.90
Infosys	1373.60	1392.80	-1.4%	13068.37	Coal India	146.90	109.55	34.1%	2243.40
Grasim Industries	1384.10	1408.00	-1.7%	1676.63	Nestle India Limited	16833.05	12200.00	38.0%	1430.46
UPL	621.35	637.70	-2.6%	3115.04	Indian Oil	101.05	71.15	42.0%	3550.63
NTPC	110.50	114.70	-3.7%	2399.30	Bharti Airtel	522.85	361.75	44.5%	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	21.42	9.7%	38.6%	1.56	Total Kenya Ltd	23.81	-4.8%	-0.8%	0.01
Bamburi Cement Limited	39.81	1.8%	5.1%	0.87	Nairobi Securities Exchange Plc	8.07	-2.8%	-1.2%	0.02
Kengen Limited	4.68	1.5%	-0.6%	2.36	NIC Group Plc	24.27	-2.3%	-9.2%	0.94
WPP Scangroup Plc	5.49	1.3%	-8.5%	0.50	Centum Investment Company Plc	16.40	-1.3%	2.3%	28.42
Safaricom Plc	37.36	0.8%	9.1%	114.74	The Cooperative Bank of Kenya Ltd	12.85	-0.9%	2.8%	1.24
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	480.00	500.00	-4.0%	1.40	Standard Chartered Bank Kenya Ltd	134.48	134.00	0.4%	1.04
Safaricom Plc	37.36	39.25	-4.8%	114.74	Centum Investment Company Plc	16.40	15.15	8.3%	28.42
East African Breweries Limited	175.00	186.00	-5.9%	84.59	WPP Scangroup Plc	5.49	5.04	8.9%	0.50
The Cooperative Bank of Kenya Ltd	12.85	13.70	-6.2%	1.24	Absa Bank Kenya	9.37	8.50	10.2%	1.72
KCB Group Plc	39.65	42.50	-6.7%	36.40	Total Kenya Ltd	23.81	21.00	13.4%	0.01

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Marketing Co.	39.50	7.6%	23.1%	217.05	Saudi Steel Pipe Co.	31.70	-2.8%	13.8%	97.32
Etihad Atheeb Telecommunication Co.	41.50	6.8%	275.2%	480.12	Alinma Tokio Marine Co.	25.20	-2.5%	3.4%	30.40
Saudi Industrial Development Co.	21.92	6.2%	54.4%	532.96	Baazeem Trading Co.	103.40	-2.5%	14.6%	111.36
Al Yamamah Steel Industries Co.	43.30	5.7%	46.0%	280.96	Amana Cooperative Insurance Co.	40.00	-2.1%	7.7%	101.16
Knowledge Economic City	18.46	5.2%	55.4%	511.38	Saudi Advanced Industries Co.	43.85	-2.0%	132.0%	1311.51
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.	41.50	41.50	0.0%	480.12	Nat. Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Tabuk Cement Co.	21.96	21.96	0.0%	66.40	BinDawood Holding Co.	109.00	105.60	3.2%	24.88
Al Yamamah Steel Industries Co.	43.30	43.30	0.0%	280.96	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	280.96
Eastern Province Cement Co.	50.10	50.10	0.0%	15.52	Saudi Airlines Catering Co.	77.00	68.50	12.4%	31.86
Alinma Bank	17.94	17.94	0.0%	605.52	Bonyan REIT Fund	8.99	7.98	12.7%	0.42

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Vodacom Group	133.66	6.6%	7.5%	520.68	Northam Platinum	244.39	-3.8%	16.6%	344.31
Mr Price Group	190.89	4.1%	11.9%	294.92	Standard Bank Group	134.27	-3.6%	5.7%	720.07
MTN Group	88.87	2.3%	47.6%	989.80	RMB Holdings Ltd	1.39	-2.8%	-0.7%	4.19
Multichoice Group	130.00	2.2%	-3.0%	151.21	BHP Group (JSE)	442.01	-2.6%	13.6%	827.23
Old Mutual Limited	13.53	1.7%	13.8%	177.94	Discovery Ltd	144.54	-2.3%	-5.9%	200.75
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.	51.99	52.43	-0.8%	183.75	Brit.Amer.Tobacco (JSE)	557.25	491.11	13.5%	630.73
MTN Group	88.87	89.76	-1.0%	989.80	Clicks Group	240.81	201.33	19.6%	363.70
Mr Price Group	190.89	193.45	-1.3%	294.92	Reinet Investments (JSE) SCA	285.50	225.03	26.9%	74.52
Nepi Rockcastle	98.28	99.90	-1.6%	157.25	Spar Group	191.32	142.25	34.5%	135.80
ABSA Group	133.00	135.95	-2.2%	449.06	Bidvest Group	179.16	126.39	41.8%	181.85

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Faros Construction	3880.00	6.9%	53.4%	65268.00	Sai Gon Thuong Tin Commercial	18900.00	-1.6%	11.8%	384976.10
Vietnam National Petroleum Group	57100.00	2.7%	4.6%	119039.00	Refrigeration Electrical Engrn	54900.00	-1.1%	12.2%	33838.00
Military Commercial Bank	28900.00	2.3%	26.8%	462875.90	Saigon Securities Inc	33200.00	-0.9%	0.3%	209024.00
Cotec Construction	79500.00	2.2%	2.3%	85533.01	Bank for Inv. and Devp	43000.00	-0.8%	-10.2%	110155.00
Masan Group Corp	88500.00	1.4%	-0.4%	76352.00	PetroVietnam Fertilizer Chem	18800.00	-0.8%	0.0%	63632.00
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)
Military Commercial Bank	28900.00	28900.00	0.0%	462875.90	Vietnam Export Import Commercial	18450.00	14000.00	31.8%	5373.00
Vietnam Prosperity	44800.00	45000.00	-0.4%	384282.90	Vietjet Aviation	135000.00	93200.00	44.8%	71296.00
Hoa Phat Group JSC	46500.00	47100.00	-1.3%	564116.00	Bank for Inv. and Devp	43000.00	29500.00	45.8%	110155.00
Techcombank	40100.00	40750.00	-1.6%	322693.10	Vinamilk	102200.00	69750.03	46.5%	277920.00
No Va Land Invest	81900.00	83500.00	-1.9%	125129.00	Vingroup JSC	106000.00	68000.00	55.9%	118694.00

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