

Daily Market Report

17 March 2021

JSE

JSE All-Share Index fell 0.41% and closed at 67,289.37 points on Tuesday, as the Resources and Financials sectors recorded losses.

BRVM

BRVM Composite Index closed at 138.66 points, up by 0.09% on Tuesday, with Setao Côte d'Ivoire and Palm Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index increased by 0.41% and closed at 38,720.81 points on Tuesday, as the Industrial and Consumer goods sectors recorded gains.

EGX

EGX 30 Index decreased by 0.28% and closed at 11,190.80 points on Tuesday, as the market lost LE 3.75 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index closed at 870.11 points on Tuesday, as it increased by 0.67%.

African Markets

Nigeria: NSE 30 increased by 0.30% and closed at 1,535.24 points on Tuesday. Guinness and Dangote Cement were the top gainers.

Egypt: EGX 30 Index decreased by 0.28% and closed at 11,190.80 points on Tuesday, as the market lost LE 3.75 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index decreased by 0.19% and closed at 1,922.70 points on Tuesday. Total Kenya and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index decreased 0.48% and closed at 61,623.63 points on Tuesday, as the Resources and Financials sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.41%

BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.09%

NSE

Nigerian Stock Exchange

▲ 0.41%

EGX

Egyptian Stock Exchange

▼ 0.28%

ESG

Casablanca Stock Exchange

▲ 0.67%

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00

INTERBANK RATES

OBB	10.25 ▼
Overnight	10.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General Index vaulted 0.72% to close at 5,749.08 points on Tuesday, as First Abu Dhabi Bank and Etisalat recorded gains. MSCI UAE Index increased 0.66% to close at 353.52 points.

Vietnam: VN-30 Index slid 0.25% to close at 1,187.84 points on Tuesday, as blue-chip stocks recorded losses. MSCI Vietnam Index fell by 0.52% to close at 909.04 points.

Saudi Arabia: Tadawul All Share Index climbed 0.15% to close at 9,660.27 points on Tuesday, as gains in the Real Estate Development, Cement and Petrochemicals sectors led shares higher. MSCI Tadawul 30 Index increased 0.17% to close at 1,304.49 points.

India: Nifty 50 Index fell 0.13% to close at 14,910.45 points on Tuesday, as losses in the Banking, Metals and Real Estate sectors pushed shares lower. MSCI India Index increased 0.13% to close at 1,702.77 points.

News

Nigeria:

Flutterwave teams up with PayPal on African payments
CBN Appoints KPMG Transaction Adviser for InfraCorp
Ardova to Float N60bn Bond Issuance Programme

Kenya:

KCB Group secures US\$ 150 mn Credit for MSMEs, Green Projects
Carrefour defies Covid to record Sh25bn sales
CMA sets deadline for coffee brokers to get fresh licences

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Abu Dhabi:

UAE's gross banking assets stand at Dh3.172tr by end of January
Petrofac suspended from new Adnoc tenders
UAE's energy producer Dana Gas mulls sale of treasury shares

Saudi Arabia:

Saudi Arabia Q4 GDP down fYoY but up on Q3 as COVID impact eases
Saudi developer Dar Al-Arkan begins sales of Bosnia project
Saudi Arabia Implements Expat Labor Reforms -- With Caveats

Egypt:

Orascom Development records profits of LE 532.18M in 2020
JD Holding aims to invest LE 12B in Administrative Capital
IFC, ALEXBank partners to support Egyptian farmers access to solar irrigation

South Africa:

Shoprite eases Africa push to focus on domestic market gains
South Africa Approves Pfizer-Biontech Vaccine for Local Use
Consumer confidence recovers lost ground

India:

Vedanta ups open offer price for Indian unit to Rs 235/share
Nazara Tech mobilises Rs 261.31 cr from anchor investors
Cabinet clears proposal to set up development finance institution: FM

Vietnam:

Renewable energy capacity to be cut due to oversupply of power: MOIT
Lục Ngạn lychee granted GI certificate in Japan
Việt Nam speeds up development of supporting industries

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,749.08	0.7%	2.0%	1.5%	13.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,190.80	-0.3%	-0.6%	-2.9%	3.2%	EGP/USD	15.70	0.0%	-0.2%
India	14,910.45	-0.1%	-0.8%	2.6%	6.6%	INR/USD	72.56	0.1%	-0.7%
Kenya	1,922.70	-0.2%	0.0%	0.4%	2.9%	KES/USD	109.70	0.0%	0.5%
Nigeria	1,535.24	0.3%	0.0%	-3.7%	-6.4%	NGN/USD	409.74	-0.2%	3.8%
Saudi Arabia	9,660.27	0.2%	0.8%	5.6%	11.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,623.63	-0.5%	-1.5%	1.4%	13.3%	ZAR/USD	14.87	-0.5%	1.2%
Vietnam	1,187.84	-0.3%	0.0%	1.2%	10.9%	VND/USD	23,083.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	574.46	0.2%	0.1%	0.1%	0.5%	Brent Crude (\$)	68.26	-1.0%	31.5%
MSCI Frontier 100	1,296.08	0.3%	0.4%	1.0%	3.0%	Gold (\$)	1,728.53	-0.1%	-8.9%
MSCI Emerging	1,349.07	0.7%	0.1%	0.7%	4.5%	Copper (\$)	8,964.50	-2.2%	15.7%
MSCI World (USD)	2,823.69	0.1%	0.6%	3.5%	5.0%	Coffee (\$)	121.3	-0.6%	1.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Guinness	25.30	10.0%	33.2%	40.77	Fidelity	2.23	-6.7%	-11.5%	35.31
Dangote Cement	227.80	3.5%	-7.0%	25.66	Ecobank	4.85	-5.8%	-19.2%	1.40
MTNN	159.90	1.2%	-5.9%	108.3	Guaranty	28.50	-4.8%	-11.9%	125.71
Sterling	1.57	0.6%	-23.0%	3.41	Zenith	20.30	-4.2%	-18.1%	163.27
					Wema	0.60	-3.2%	-13.0%	0.73
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%	1.18	Transcorp Hotels	3.25	3.25	0.0%	0.10
Guinness	25.30	25.30	0.0%	40.77	UBN	5.05	4.65	8.6%	6.55
Airtel Africa	930.00	930.00	0.0%	0.50	Julius Berger	17.00	14.90	14.1%	0.79
Total	142.00	143.00	-0.7%	1.77	Ecobank	4.85	3.90	24.4%	1.40
Seplat Petroleum	545.00	583.00	-6.5%	123.53	P Z Cussons	4.85	3.80	27.6%	5.83

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	5.75	4.5%	47.4%	0.06	National Takaful Company	0.77	-10.0%	-23.2%	0.54
Manazel PJSC	0.37	3.4%	5.7%	2.53	Methaq Takaful Ins.	0.84	-3.1%	-3.2%	0.20
Bank of Sharjah PJSC	0.63	2.3%	-0.6%	0.02	Gulf Pharma Ind.	1.26	-3.1%	-5.3%	0.11
Eshraq Investments	0.35	2.0%	11.0%	7.68	RAK Properties	0.53	-1.9%	9.6%	1.34
Abu Dhabi Ship Building	2.04	1.5%	-12.4%	2.11	Ras Al Khaimah Cement	0.71	-1.4%	-9.6%	0.00
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	7.17	7.17	0.0%	3.78	Insurance House	0.81	0.81	0.0%	0.0
United Fidelity Ins. Co.	2.00	2.00	0.0%	0.0	Al Khazna Insurance 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	4.17	2.5%	25.6%	23.15	Ezz Steel	9.34	-4.1%	-13.0%	12.74
Abou Kir Fertilizers	21.40	2.0%	3.5%	2.33	Orascom Financial Holding	0.31	-3.8%	-36.0%	15.22
Orascom Development Egypt	5.99	1.9%	22.2%	24.48	Edita Food Industries S.A.E	8.50	-3.5%	-4.5%	0.04
Medinet Nasr Housing	3.79	1.1%	-0.8%	10.61	Palm Hills Dev. Company	1.63	-2.7%	19.6%	4.66
Heliopolis Housing	5.02	0.6%	-17.7%	9.39	MM Group For Ind. And Intl. Trade	10.90	-1.9%	39.0%	17.40
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	-1.3%	1.67	Orascom Financial Holding	0.31	0.30	1.7%	15.22
GB AUTO	4.17	4.24	-1.7%	23.15	Credit Agricole Egypt	23.99	23.04	4.1%	10.53
Orascom Development Egypt	5.99	6.23	-3.9%	24.48	Ibnsina Pharma	4.79	4.55	5.3%	24.81
Six of October Development & Investment (SODIC)	16.54	17.40	-4.9%	1.93	Edita Food Industries S.A.E	8.50	7.76	9.5%	0.04
Sidi Kerir Petrochemicals	10.80	11.67	-7.5%	5.94	Emaar Misr for Development	2.40	2.13	12.7%	4.33

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Asian Paints	2468.60	4.8%	-10.7%	3608.442	Tata Steel	724.05	-1.7%	12.5%	11276.36
Dr Reddys Lab	4449.70	2.5%	-14.5%	4001.64	Cipla	792.30	-1.6%	-3.4%	2119.20
HUL	2244.05	1.5%	-6.3%	3599.63	Larsen & Toubro	1461.80	-1.5%	13.5%	4739.33
Hcl Technologies	1007.25	1.5%	6.5%	5254.31	Bharat Petroleum	453.85	-1.5%	19.1%	7732.16
Tata Consultancy Svs.	3110.05	1.4%	8.6%	9507.41	Icici Bank	594.95	-1.4%	11.2%	14581.91
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	1384.00	1406.00	-1.6%	9122.08	HUL	2244.05	1757.30	27.7%	3599.63
Grasim Industries	1384.50	1408.00	-1.7%	1329.85	Coal India	145.70	109.55	33.0%	2305.49
Jsw Steel	425.95	435.00	-2.1%	4296.13	Nestle India Limited	16741.95	12200.00	37.2%	1157.16
UPL	620.25	639.55	-3.0%	3355.49	Indian Oil	100.40	71.15	41.1%	2129.78
Indian Oil	100.40	105.00	-4.4%	2129.78	Bharti Airtel	529.30	361.75	46.3%	5570.68

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	86.43	4.1%	1.7%	16.60	Total Kenya Ltd	22.03	-7.5%	-8.2%	0.05
Centum Investment Company Plc	16.65	1.5%	3.9%	0.15	Nairobi Securities Exchange Plc	7.74	-4.1%	-5.3%	0.32
British American Tobacco Kenya Ltd	483.98	0.8%	34.1%	0.14	Diamond Trust Bank Limited	73.55	-1.9%	-1.8%	0.18
Kenya Power & Lighting Limited	1.39	0.7%	-18.7%	0.31	Kenya Reinsurance Corporation Ltd	2.54	-1.9%	9.5%	0.68
KCB Group Plc	39.93	0.7%	4.8%	2.51	Nation Media Group	21.01	-1.9%	35.9%	7.91
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	483.98	500.00	-3.2%	0.14	Standard Chartered Bank Kenya Ltd	134.24	134.00	0.2%	4.17
Safaricom Plc	37.39	39.25	-4.7%	262.47	Total Kenya Ltd	22.03	21.00	4.9%	0.05
East African Breweries Limited	175.00	185.00	-5.4%	98.54	WPP Scangroup Plc	5.50	5.04	9.1%	0.60
KCB Group Plc	39.93	42.50	-6.0%	2.51	Absa Bank Kenya	9.31	8.50	9.5%	3.93
The Cooperative Bank of Kenya Ltd	12.85	13.70	-6.2%	0.71	Centum Investment Company Plc	16.65	15.15	9.9%	0.15

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Rabigh Refining and Petrochemical Co.	17.28	9.9%	25.0%	338.13	Alkhaleej Training and Education Co.	25.00	-7.7%	11.3%	289.16
Emaar The Economic City	11.92	6.8%	29.4%	561.06	Middle East Specialized Cables	20.50	-7.2%	32.9%	147.41
Saudi Kayan Petrochemical Co.	16.46	5.8%	15.1%	491.88	AlJazira Mawten REIT Fund	23.04	-6.7%	0.9%	0.0
Gulf General Cooperative Insurance Co.	26.95	3.7%	8.4%	64.57	Al-Jouf Agricultural Development Co.	80.10	-6.3%	118.3%	356.71
Dar Alarkan Real Estate Development Co.	9.48	3.6%	9.5%	1584.77	Saudi Industrial Development Co.	20.64	-5.8%	45.4%	200.57
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)
Etiihad Atheeb Telecommunication Co.	40.40	40.40	0.0%	198.04	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Rabigh Refining and Petrochemical Co.	17.28	17.28	0.0%	338.13	BinDawood Holding Co.	109.80	105.60	4.0%	29.52
Eastern Province Cement Co.	50.30	50.50	-0.4%	12.75	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	124.15
Riyad Bank	22.38	22.50	-0.5%	32.11	Saudi Airlines Catering Co.	76.00	69.00	10.1%	28.34
Saudi Basic Industries Corp.	111.40	112.00	-0.5%	191.92	Bonyan REIT Fund	8.98	7.98	12.5%	0.49

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sibanye Stillwater	70.34	4.6%	17.2%	1441.41	Woolworths Hdq.	50.16	-3.5%	26.9%	216.06
Shoprite Limited	151.64	4.4%	8.3%	375.44	ABSA Group	128.64	-3.3%	7.3%	441.84
MTN Group	91.21	2.6%	51.5%	845.30	Nedbank Group	138.02	-3.0%	6.6%	191.82
Vodacom Group	136.03	1.8%	9.4%	463.60	Bid Corporation	298.30	-3.0%	13.4%	287.26
Northam Platinum	248.71	1.8%	18.7%	262.39	Standard Bank Group	130.41	-2.9%	2.6%	529.24
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)
MTN Group	91.21	91.86	-0.7%	845.30	Brit.Amer.Tobacco (JSE)	552.45	491.11	12.5%	348.84
Shoprite Limited	151.64	153.42	-1.2%	375.44	Clicks Group	242.08	201.33	20.2%	212.65
Vodacom Group	136.03	139.35	-2.4%	463.60	Spar Group	193.73	155.29	24.8%	184.63
Investec Plc	45.13	46.25	-2.4%	47.77	Reinet Investments (JSE) SCA	281.61	225.03	25.1%	46.29
Mr Price Group	189.10	194.20	-2.6%	292.33	Bidvest Group	174.45	126.39	38.0%	225.67

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
FPT Corp	81000.00	5.9%	37.1%	135307.00	Refrigeration Electrical Engrn	53900.00	-1.8%	10.1%	32358.00
Faros Construction	4100.00	5.7%	62.1%	65053.01	Saigon Securities Inc	32700.00	-1.5%	-1.2%	236892.00
Saigon Beer Alcohol	180600.00	2.0%	-7.4%	20218.00	Bank for Inv. and Devp	42400.00	-1.4%	-11.5%	120500.00
Vietnam National Petroleum Group	57800.00	1.2%	5.9%	255166.00	No Va Land Invest	80900.00	-1.2%	24.0%	217722.00
Vincom Retail	34800.00	1.0%	10.8%	104617.00	Vinamilk	101000.00	-1.2%	-7.2%	243602.00
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)
FPT Corp	81000.00	81500.00	-0.6%	135307.00	Vietnam Export Import Commercial Bank for Inv. and Devp	18400.00	14000.00	31.4%	7226.00
Vietnam Prosperity	44350.00	45000.00	-1.4%	226751.00	Vietjet Aviation	42400.00	29500.00	43.7%	120500.00
Military Commercial Bank	28650.00	29150.00	-1.7%	663326.00	Vinamilk	134600.00	93200.00	44.4%	66715.01
Hoa Phat Group JSC	46100.00	47100.00	-2.1%	554861.10	Vingroup JSC	101000.00	69750.03	44.8%	243602.00
Techcombank	39850.00	40750.00	-2.2%	347439.10		105400.00	68000.00	55.0%	278476.00

Email: research@fsdhgroup.com • www.fsdhgroup.com

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