

Daily Market Report

18 March 2021

JSE

JSE All-Share Index fell 1.18% and closed at 66,494.50 points on Wednesday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 139.21 points, up by 0.40% on Wednesday, with Bank of Africa - Niger and Saph Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index declined by 0.04% and closed at 38,706.13 points on Wednesday, as the Insurance, Banking and Consumer goods sectors recorded losses.

EGX

EGX 30 Index dropped by 1.09% and closed at 11,068.37 points on Wednesday, as the market lost LE 3.09 billion of market cap, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 878.51 points on Wednesday, as it increased by 0.97%.

African Markets

Nigeria: NSE 30 slipped by 0.05% and closed at 1,534.52 points on Wednesday. Fidelity and Guaranty were the top losers.

Egypt: EGX 30 Index dropped by 1.09% and closed at 11,068.37 points on Wednesday, as the market lost LE 3.09 billion of market cap, amid Egyptian selling.

Kenya: NSE 20 Index increased by 0.38% and closed at 1,930.06 points on Wednesday. Diamond Trust Bank and Kenya Reinsurance Corporation were the top gainers.

South Africa: JSE Top 40 Index decreased 1.32% and closed at 60,810.17 points on Wednesday, as all the sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 1.18%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.40%

NSE

Nigerian Stock Exchange ▼ 0.04%

EGX

Egyptian Stock Exchange ▼ 1.09%

ESG

Casablanca Stock Exchange ▲ 0.97%

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00
INTERBANK RATES	
OBB	12.67 ▲
Overnight	13.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General Index declined slightly by 0.05% to close at 5,746.17 points on Wednesday, as First Abu Dhabi Bank and Abu Dhabi National Oil Company for Distribution recorded losses. MSCI UAE Index fell by 0.24% to close at 352.69 points.

Vietnam: VN-30 Index increased by 0.47% to close at 1,193.45 points on Wednesday, as blue-chip stocks recorded gains. MSCI Vietnam Index edged 0.06% down to close at 908.52 points.

Saudi Arabia: Tadawul All Share Index fell by 0.60% to close at 9,602.26 points on Wednesday, as losses in the Telecoms & IT, Transport and Building & Construction sectors pushed shares lower. MSCI Tadawul 30 Index decreased by 0.77% to close at 1,294.42 points.

India: Nifty 50 Index plunged 1.27% to close at 14,721.30 points on Wednesday, as losses in the Oil & Gas, Public Sector Undertakings and Power sectors pushed shares lower. MSCI India Index decreased 1.35% to close at 1,679.81 points.

News

Nigeria:

External reserves drop by \$523m in two weeks
FG to auction N150bn bonds in March
Nigeria Wealth Fund Trims Bond and Tech Bets Amid Warnings

Kenya:

KCB profit falls to Sh19.6bn on increased bad loans provision
Geothermal power firm gets Sh500m grant for Baringo wells
Shilling seen trading in tight range despite oil price rise

Abu Dhabi:

ADNOC Distribution shareholders approve \$350mln dividend for 2H20
Abu Dhabi, Israel ink deal to ease reciprocal business expansion
AD Gaming formed to further gaming sector in Abu Dhabi

Saudi Arabia:

Saudi Arabia approves privatisation law
Saudi mall operator Arabian Centres plans \$500mln sukuk - sources
Saudi National Building cancels MoU to buy 50% stake in German Saudi Industrial

Egypt:

Egypt prepares to start move to new capital, away from the chaos of Cairo
Egypt, France sign MoU to develop apps, build capacity in AI
Egypt approves \$217 million financing agreements for development projects

South Africa:

Treasury postpones its switch auction by a week
Nedbank decides against dividend as profits slump
SA's retail sales down 3.5% year on year in January

India:

BHEL emerges lowest bidder for NPCIL's Rs 10,800 crore-tender
Domestic air traffic sequential growth slows down to 1.2% in February
Policybazaar gets \$75 million from Falcon Edge for UAE business

Vietnam:

Vietrade, Alibaba.com partner to help firms with online exports
Two more dairy firms licensed to export to China
Japan's food giant Meiji to establish subsidiary in Hanoi

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,746.17	-0.1%	1.9%	1.5%	13.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,068.37	-1.1%	-1.7%	-4.0%	2.1%	EGP/USD	15.71	0.1%	-0.1%
India	14,721.30	-1.2%	-2.1%	1.3%	5.3%	INR/USD	72.54	0.0%	-0.7%
Kenya	1,930.06	0.4%	0.4%	0.8%	3.3%	KES/USD	109.80	0.1%	0.5%
Nigeria	1,534.52	-0.05%	-0.1%	-3.7%	-6.4%	NGN/USD	410.28	0.1%	3.9%
Saudi Arabia	9,602.26	-0.6%	0.2%	5.0%	10.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,810.17	-1.3%	-2.8%	0.1%	11.8%	ZAR/USD	14.90	0.2%	1.4%
Vietnam	1,193.45	0.5%	0.5%	1.7%	11.5%	VND/USD	23,066.00	-0.1%	-0.1%

MSCI Emerging Markets

MSCI Frontier	574.81	0.1%	0.2%	0.1%	0.6%	Brent Crude (\$)	67.53	-1.3%	30.1%
MSCI Frontier 100	1,297.26	0.1%	0.5%	1.0%	3.1%	Gold (\$)	1,727.24	-0.1%	-9.0%
MSCI Emerging	1,342.80	-0.5%	-0.4%	0.3%	4.0%	Copper (\$)	9,070.75	1.2%	17.1%
MSCI World (USD)	2,826.79	0.1%	0.7%	3.7%	5.1%	Coffee (\$)	123.11	1.5%	3.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	0.82	1.2%	-8.9%	10.09	Axamansard	0.94	-5.1%	-10.5%	17.28
Zenith	20.50	1.0%	-17.3%	315.92	Fidelity	2.19	-1.8%	-13.1%	6.20
Seplat Petroleum	550.00	0.9%	36.7%	1.60	Guaranty	28.00	-1.8%	-13.4%	470.57
					Wema	0.59	-1.7%	-14.5%	0.63
					FBNH	7.20	-1.4%	0.7%	110.99
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%	3.26	Transcorp Hotels	3.25	3.25	0.0%	0.07
Guinness	25.30	25.30	0.0%	44.41	UBN	5.05	4.65	8.6%	3.09
Airtel Africa	930.00	930.00	0.0%	0.20	Julius Berger	17.00	14.90	14.1%	2.78
Total	142.00	143.00	-0.7%	3.25	Ecobank	4.85	3.90	24.4%	8.77
Seplat Petroleum	550.00	583.00	-5.7%	1.60	P Z Cussons	4.85	3.80	27.6%	1.67

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	0.23	14.0%	-12.0%	0.00	RAK Co. for White Cement & Constrn.	0.72	-10.0%	-15.2%	0.00
National Takaful Company	0.85	10.7%	-15.0%	0.54	Emirates Insurance	7.56	-9.9%	6.5%	0.02
Al Khaleej Inv. Co	1.26	5.0%	14.5%	0.01	National Bank of Ras Al Khaimah	3.65	-6.2%	-6.4%	0.79
Abu Dhabi National Takaful	6.00	4.3%	53.8%	0.06	Bank of Sharjah PJSC	0.60	-4.2%	-4.8%	0.07
Ooredoo QPSC	7.10	3.2%	-5.6%	33.97	Manazel PJSC	0.36	-4.1%	1.4%	6.32
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
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 Insurance Co	1.00	1.00	0.0%	0.0
Ras Al Khaimah National Ins.	3.75	3.75	0.0%	0.0	Al Ain Ahlia Ins.	33.00	33.00	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£)
Orascom Investment Holding	0.31	2.6%	-44.2%	15.30	CI Capital Holding For Financial Investments	3.88	-9.6%	-2.8%	0.09
Palm Hills Dev. Company	1.66	1.9%	21.9%	2.55	Cleopatra Hospital Company	4.83	-3.0%	1.5%	0.30
Sidi Kerir Petrochemicals	10.97	1.6%	17.8%	3.82	Fawry For Banking Tech ,electronic pay.	35.83	-3.0%	37.1%	16.99
Oriental Weavers	7.13	1.0%	4.1%	3.95	Ibnsina Pharma	4.67	-2.5%	-8.3%	9.85
Six of October Development & Investment (SODIC)	16.68	0.8%	12.4%	1.60	GB AUTO	4.08	-2.2%	22.9%	9.36
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	-0.8%	0.37	Orascom Financial Holding	0.30	0.30	2.0%	12.61
GB AUTO	4.08	4.24	-3.8%	9.36	Ibnsina Pharma	4.67	4.55	2.6%	9.85
Six of October Development & Investment (SODIC)	16.68	17.40	-4.1%	1.60	Credit Agricole Egypt	23.97	23.04	4.0%	1.15
Orascom Development Egypt	5.89	6.23	-5.5%	7.23	Edita Food Industries S.A.E	8.35	7.76	7.6%	0.23
Sidi Kerir Petrochemicals	10.97	11.67	-6.0%	3.82	Emaar Misr for Development	2.41	2.13	13.1%	2.95

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
ITC	210.60	1.3%	0.8%	10109.440	ONGC	109.35	-5.0%	17.5%	2380.93
Infosys	1387.00	0.2%	10.4%	13011.54	Bharat Petroleum	432.05	-4.8%	13.4%	7026.18
HDFC	2515.55	0.2%	-1.7%	6188.68	Tata Motors	305.80	-4.4%	66.3%	12507.93
Tata Consultancy Svs.	3112.95	0.1%	8.7%	15242.82	Adani Ports And Sez.	688.25	-4.1%	42.3%	10847.52
					Coal India	139.85	-4.0%	3.2%	1728.52
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	1387.00	1406.00	-1.4%	13011.54	HUL	2226.30	1757.30	26.7%	5879.63
Jsw Steel	422.50	435.00	-2.9%	3444.59	Coal India	139.85	109.55	27.7%	1728.52
Grasim Industries	1367.10	1408.00	-2.9%	1632.14	Nestle India Limited	16455.75	12200.00	34.9%	1420.43
UPL	609.20	639.55	-4.7%	5276.93	Indian Oil	98.20	71.15	38.0%	2776.60
Tech Mahindra	1020.05	1081.55	-5.7%	4959.81	Bharti Airtel	522.90	361.75	44.5%	6893.08

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	76.75	4.4%	2.5%	0.40	Nation Media Group	20.21	-3.8%	30.7%	3.20
Kenya Reinsurance Corporation Ltd	2.62	3.1%	12.9%	0.13	Stanbic Holdings	85.75	-0.8%	0.9%	0.17
Nairobi Securities Exchange Plc	7.93	2.5%	-2.9%	0.41	Centum Investment Company Plc	16.52	-0.8%	3.1%	2.43
WPP Scangroup Plc	5.60	1.8%	-6.7%	0.29	British American Tobacco Kenya Ltd	480.26	-0.8%	33.0%	0.68
NIC Group Plc	24.47	1.1%	-8.5%	0.29	Kenya Power & Lighting Limited	1.38	-0.7%	-19.3%	0.35
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	480.26	500.00	-3.9%	0.68	Standard Chartered Bank Kenya Ltd	133.66	132.00	1.3%	0.93
Safaricom Plc	37.55	39.25	-4.3%	313.13	Total Kenya Ltd	22.08	21.00	5.1%	1.40
KCB Group Plc	40.11	42.50	-5.6%	81.77	Centum Investment Company Plc	16.52	15.15	9.0%	2.43
East African Breweries Limited	174.33	185.00	-5.8%	127.17	Absa Bank Kenya	9.34	8.50	9.9%	1.52
Equity Group Holdings Plc	40.25	43.00	-6.4%	80.74	WPP Scangroup Plc	5.60	5.04	11.1%	0.29

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Abdulmohsen Alhokair Group for Tourism and Development	24.06	10.0%	13.6%	156.86	Saudi Public Transport Co.	25.85	-8.7%	44.1%	349.10
AlJazira Mawten REIT Fund	24.00	4.2%	5.1%	45.63	Al-Jouf Agricultural Development and Co.	74.20	-7.4%	102.2%	347.73
Electrical Industries Co.	28.80	4.0%	12.1%	399.53	Al Yamamah Steel Industries Co.	40.00	-6.5%	34.9%	104.27
Saudi Re for Cooperative Reinsurance Co.	14.40	3.6%	-4.8%	109.36	Knowledge Economic City	17.70	-5.7%	49.0%	187.77
Al-Omran Industrial & Trading Co	108.00	3.3%	14.2%	63.64	Saudi Advanced Industries Co.	40.15	-3.8%	112.4%	286.90
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.	41.25	41.25	0.0%	339.14	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Eastern Province Cement Co.	51.10	51.10	0.0%	14.72	BinDawood Holding Co.	109.40	105.60	3.6%	12.13
Riyad Bank	22.32	22.50	-0.8%	25.30	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	101.984
Derayah REIT Fund	11.68	11.80	-1.0%	1.95	Saudi Airlines Catering Co.	76.90	69.00	11.4%	10.59
Najran Cement Co.	21.94	22.22	-1.3%	14.99	Bonyan REIT Fund	8.96	7.98	12.3%	0.96

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Limited	157.58	3.9%	12.6%	554.23	Sibanye Stillwater	66.82	-5.0%	11.4%	813.93
Brit.Amer.Tobacco (JSE)	566.38	2.5%	3.8%	472.22	Impala Platinum	264.96	-5.0%	31.2%	970.21
Spar Group	197.34	1.9%	4.1%	300.99	Nepi Rockcastle	92.93	-4.4%	-0.6%	115.19
Multichoice Group	130.00	1.2%	-3.0%	180.69	Discovery Ltd	135.91	-3.8%	-11.5%	213.16
Anglo American Platinum	2081.78	0.4%	44.3%	522.48	Anglo American (JSE)	587.69	-3.7%	21.2%	782.05
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)
Investec Plc	45.26	46.25	-2.1%	47.85	Brit.Amer.Tobacco (JSE)	566.38	491.11	15.3%	472.22
Shoprite Limited	157.58	161.14	-2.2%	554.23	Clicks Group	242.00	201.33	20.2%	296.06
Investec Ltd (JSE)	47.42	48.86	-2.9%	93.55	Spar Group	197.34	160.71	22.8%	300.99
MTN Group	89.38	92.56	-3.4%	726.79	Reinet Investments (JSE) SCA	281.01	225.03	24.9%	58.68
Mr Price Group	186.52	194.20	-4.0%	186.04	Vodacom Group	133.59	106.36	25.6%	291.50

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
PetroVietnam Fertilizer Chem	19650.00	5.1%	4.5%	35457.01	Faros Construction	3870.00	-5.6%	53.0%	190018.00
Vietnam JSC Bank	39550.00	4.9%	14.5%	267712.00	Cotec Construction	77900.00	-1.3%	0.3%	61459.01
Sai Gon Thuong Tin Commercial	19600.00	3.7%	16.0%	451127.00	Thanh Thanh Cong Tay Ninh	23500.00	-0.8%	12.2%	73948.00
Petrovietnam Gas	92800.00	2.8%	7.2%	80955.01	Vietjet Aviation	133500.00	-0.8%	6.8%	64157.01
Ho Chi Minh City Devp	27500.00	2.6%	15.8%	121631.00	Saigon Beer Alcohol	179200.00	-0.8%	-8.1%	16269.00
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	29000.00	29150.00	-0.5%	366121.00	Vietnam Export Import Commercial	18450.00	14000.00	31.8%	5074.00
FPT Corp	80800.00	81500.00	-0.9%	404799.00	Vietjet Aviation	133500.00	93200.00	43.2%	64157.01
Vietnam Prosperity	44600.00	45000.00	-0.9%	242018.00	Vinamilk	100500.00	69750.03	44.1%	416238.10
Techcombank	40300.00	40750.00	-1.1%	459937.00	Bank for Inv. and Devp	43300.00	29500.00	46.8%	94797.01
Vietnam JSC Bank	39550.00	40100.00	-1.4%	267712.00	Vingroup JSC	104700.00	68000.00	54.0%	143392.00

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