

Daily Market Report

22 March 2021

JSE

JSE All-Share Index fell 1.24% and closed at 65,911.25 points on Friday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 141.68 points, up by 1.49% on Friday, with SMB Côte d'Ivoire and Palm Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index dropped by 1.37% and closed at 38,382.39 points on Friday, as the Industrial and oil & gas sectors recorded losses.

EGX

EGX 30 Index declined by 1.06% and closed at 10,802.29 points on Sunday, as the market lost LE 8.29 billion of market cap, amid Arab selling.

ESG

Casablanca ESG 10 Index closed at 873.12 points on Friday, as it decreased by 0.28%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.24%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 1.49%
NSE Nigerian Stock Exchange	▼ 1.37%
EGX Egyptian Stock Exchange	▼ 1.06%
ESG Casablanca Stock Exchange	▼ 0.28%

African Markets

Nigeria: NSE 30 declined by 1.59% and closed at 1,520.46 points on Friday. BUA Cement and Dangote Cement were the top losers.

Egypt: EGX 30 Index declined by 1.06% and closed at 10,802.29 points on Sunday, as the market lost LE 8.29 billion of market cap, amid Arab selling.

Kenya: NSE 20 Index decreased by 0.14% and closed at 1,933.60 points on Friday. Nation Media Group and Total Kenya were the top losers.

South Africa: JSE Top 40 Index plunged 1.21% and closed at 60,313.40 points on Friday, as all the sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00
INTERBANK RATES	
OBB	25.00 ▲
Overnight	25.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General Index declined by 0.22% to close at 5,723.09 points on Sunday, as First Abu Dhabi Bank and ALDAR properties recorded losses. MSCI UAE Index remained unchanged at 352.38 points.

Vietnam: VN-30 Index decreased by 0.68% to close at 1,203.36 points on Friday, as blue-chip stocks recorded losses. MSCI Vietnam Index fell 0.80% to close at 912.21 points.

Saudi Arabia: Tadawul All Share Index increased by 0.14% to close at 9,498.85 points on Sunday, as gains in the Agriculture & Food, Building & Construction and Insurance sectors pushed shares higher. MSCI Tadawul 30 Index edged 0.01% down to close at 1,275 points.

India: Nifty 50 Index rose 1.28% to close at 14,744 points on Friday, as gains in the Power, Fast Moving Consumer Goods and Metals sectors pushed shares higher. MSCI India Index increased 1.40% to close at 1,680.89 points.

News

Nigeria:

Lagos Free Zone targets additional \$5bn investment
Power generation falls to 3,657MW as hydro output plunges
Dangote Cement Announces N273 Billion Dividend for Shareholders

Kenya:

Britam Holdings to sell HF stake to a big bank
Co-operative Bank Net Earnings decline 25%, Declares KSh 1.00 Dividend
Trade deficit starts to rise as imports go up

Abu Dhabi:

UAE introduces multiple entry tourist visa for all nationalities
UAE retail sales expected to hit \$58 billion this year
Crypto firms now able to set up in Dubai free zone

Saudi Arabia:

Saudi Aramco to cut capex after 2020 profit drops 44.4%
Saudia signs \$3bn financing deal for fleet expansion
Saudi Aramco to prioritise energy supply to China for 50 yrs, says CEO

Egypt:

Egypt's new mortgage finance scheme to spur demand for residential properties
\$74.64bln increase in financial position of banks in Egypt during 2020: CBE
Egypt, BCG cooperate on agricultural supply chain development

South Africa:

Northam Platinum profit surges 74% on metals prices
Investec flags up to 29% full-year profit drop
Mantashe announces eight investment projects to inject R45bn into economy

India:

Food delivery startup Zomato plans IPO filing next month
Adani arm AGEL to acquire 50 MW solar asset from SkyPower Global
EPFO's net new enrolments up 28% to 13.36 lakh in January

Vietnam:

Foxconn in talks with VinFast on batteries and components for electric vehicles
Price management faces new conditions amid pandemic
PM inaugurates key industrial zone in Long An

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,723.09	-0.2%	-0.2%	1.1%	13.4%	AED/USD	3.67	0.0%	0.0%
Egypt	10,802.29	-1.1%	-1.1%	-6.3%	-0.4%	EGP/USD	15.68	0.0%	-0.3%
India	14,744.00	1.3%	0.0%	1.5%	5.5%	INR/USD	72.52	0.0%	-0.7%
Kenya	1,933.60	-0.1%	0.0%	0.9%	3.5%	KES/USD	109.85	0.0%	0.6%
Nigeria	1,520.46	-1.6%	0.0%	-4.6%	-7.3%	NGN/USD	410.55	-0.3%	4.0%
Saudi Arabia	9,498.85	0.1%	0.1%	3.9%	9.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,313.40	-1.2%	0.0%	-0.7%	10.9%	ZAR/USD	14.74	-0.2%	0.4%
Vietnam	1,203.36	-0.7%	0.0%	2.5%	12.4%	VND/USD	23,075.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	577.19	-0.2%	0.0%	0.6%	1.0%	Brent Crude (\$)	64.18	2.8%	23.7%
MSCI Frontier 100	1,302.49	-0.1%	0.0%	1.5%	3.5%	Gold (\$)	1,740.01	0.3%	-8.3%
MSCI Emerging	1,336.84	-0.8%	0.0%	-0.2%	3.5%	Copper (\$)	9,072.50	0.1%	17.1%
MSCI World (USD)	2,796.14	-0.2%	0.0%	2.5%	3.9%	Coffee (\$)	120.39	-1.7%	1.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UBN	5.30	5.0%	-0.9%	6.04	BUA Cement	69.95	-6.4%	-9.6%	52.28
Guaranty	31.00	4.0%	-4.2%	1227.79	Dangote Cement	220.00	-3.4%	-10.2%	65.57
Nascon	14.90	2.8%	2.8%	1.63	Okomu Oil	90.00	-3.2%	-1.1%	13.11
Access	8.05	2.5%	-4.7%	101.08	MTNN	157.00	-1.8%	-7.6%	232.20
Transnational Corporation	0.82	2.5%	-8.9%	3.77					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Guinness	25.30	25.30	0.0%	9.22	Transcorp Hotels	3.25	3.25	0.0%	0.04
Airtel Africa	930.00	930.00	0.0%	0.80	UBN	5.30	4.65	14.0%	6.04
Total	142.00	143.00	-0.7%	0.21	Julius Berger	17.00	14.90	14.1%	2.59
Okomu Oil	90.00	93.00	-3.2%	13.11	Ecobank	4.85	3.90	24.4%	8.09
Seplat Petroleum	550.00	583.00	-5.7%	246.86	P Z Cussons	4.85	3.80	27.6%	0.49

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	0.26	13.2%	-0.4%	0.00	Sudatel Telecom	0.39	-4.6%	-6.0%	0.14
Sharjah Cement	0.74	10.4%	-3.3%	0.01	Ras Al Khaimah Cement	0.70	-3.3%	-10.8%	0.14
National Bank of Ras Al Khaimah	3.80	4.1%	-2.6%	0.59	Eshraq Investments	0.35	-2.8%	8.5%	1.56
RAK Properties PJSC	0.54	2.3%	11.7%	1.52	Waha Capital	1.18	-1.7%	-1.7%	0.26
Bank of Sharjah PJSC	0.61	2.0%	-2.9%	10.81	Sharjah Islamic Bank	1.31	-1.5%	-0.8%	0.55
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)
Sawaed 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	7.20	7.20	0.0%	4.02	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.	33.00	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£)
Eastern Company	12.41	2.0%	-4.8%	1.43	GB AUTO	3.83	-5.2%	15.4%	7.04
Orascom Investment Holding	0.32	1.6%	-43.3%	21.50	Ibnsina Pharma	4.30	-4.7%	-15.5%	10.58
Orascom Financial Holding	0.30	1.0%	-36.6%	13.83	Heliopolis Housing	4.78	-4.2%	-21.6%	9.19
Egyptian Kuwaiti Holding	1.16	0.1%	14.4%	1.85	Orascom Dev. Egypt	5.54	-4.2%	13.1%	1.69
					CI Capital Holding For Financial Investments	3.39	-3.4%	-15.0%	1.56
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	-1.0%	1.85	Orascom Financial Holding	0.30	0.30	1.0%	10.49
Six of October Development & Investment (SODIC)	16.73	17.40	-3.9%	0.29	Ibnsina Pharma	4.51	4.45	1.3%	14.47
Sidi Kerir Petrochemicals	10.73	11.67	-8.1%	10.76	Credit Agricole Egypt	23.97	23.04	4.0%	0.95
Palm Hills Dev. Company	1.66	1.83	-9.1%	5.43	Edita Food Industries S.A.E	8.35	7.76	7.6%	2.57
GB AUTO	3.83	4.24	-9.7%	7.04	Emaar Misr for Development	2.39	2.14	11.7%	1.38

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	108.50	4.5%	9.2%	7761.267	Larsen & Toubro	1411.25	-1.2%	9.6%	13928.98
HUL	2312.05	4.4%	-3.5%	12264.52	Tech Mahindra	989.45	-0.7%	1.7%	6135.25
Power Grid Corp Of India	230.20	4.1%	21.3%	9031.70	Coal India	136.30	-0.5%	0.6%	4560.66
Jsw Steel	440.55	4.1%	13.8%	4792.85	Bajaj Auto	3650.05	-0.4%	6.0%	4121.74
UPL	625.45	4.0%	34.1%	5093.33	Titan Company	1465.45	-0.2%	-6.5%	3443.40
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Grasim Industries	1411.25	1415.00	-0.3%	3391.37	Coal India	136.30	109.55	24.4%	4560.66
Jsw Steel	440.55	446.30	-1.3%	4792.85	HUL	2312.05	1850.00	25.0%	12264.52
UPL	625.45	639.55	-2.2%	5093.33	Bharti Airtel	529.95	394.00	34.5%	25818.11
Power Grid Corp Of India	230.20	238.30	-3.4%	9031.70	Nestle India Limited	16450.85	12200.00	34.8%	3272.90
Ultratech Cement	6672.00	6944.20	-3.9%	4285.80	Indian Oil	98.75	71.15	38.8%	3377.79

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
The Cooperative Bank of Kenya Ltd	13.92	4.9%	11.4%	4.30	Nation Media Group	18.55	-5.3%	20.0%	0.90
Centum Investment Company Plc	16.50	2.2%	2.9%	4.48	Total Kenya Ltd	23.00	-4.0%	-4.1%	0.01
Safaricom Plc	38.59	1.2%	12.7%	123.20	WPP Scangroup Plc	5.51	-2.1%	-8.2%	0.40
Kenya Reinsurance Corporation Ltd	2.65	1.1%	14.2%	0.04	Diamond Trust Bank Limited	73.68	-1.4%	-1.6%	0.19
KCB Group Plc	41.33	1.1%	8.5%	18.10	Nairobi Securities Exchange Plc	8.00	-1.2%	-2.1%	0.06
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)
The Cooperative Bank of Kenya Ltd	13.92	14.05	-0.9%	4.30	Standard Chartered Bank Kenya Ltd	133.07	132.00	0.8%	6.61
Safaricom Plc	38.59	39.25	-1.7%	123.20	Centum Investment Company Plc	16.50	15.15	8.9%	4.48
KCB Group Plc	41.33	42.50	-2.8%	18.10	WPP Scangroup Plc	5.51	5.04	9.3%	0.40
Equity Group Holdings Plc	41.64	43.00	-3.2%	81.96	Total Kenya Ltd	23.00	21.00	9.5%	0.01
British American Tobacco Kenya Ltd	484.00	500.00	-3.2%	0.19	Absa Bank Kenya	9.43	8.50	10.9%	0.16

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Jouf Agricultural Development Co.	82.70	10.0%	125.3%	347.34	Rabigh Refining and Petrochemical Co.	16.48	-3.7%	19.2%	103.82
Middle East Paper Co.	23.50	7.0%	21.6%	133.40	Emaar The Economic City	11.22	-3.1%	21.8%	120.49
Al Gassim Investment Holding Co.	29.40	6.9%	51.9%	284.10	Zamil Industrial Investment Co.	22.94	-2.7%	10.5%	25.46
Arriyadh Development Co.	19.90	4.7%	15.8%	91.63	Advanced Petrochemical Co.	66.20	-1.9%	-1.2%	15.10
Ash-Sharqiyah Development Co.	110.80	4.7%	17.0%	120.54	Saudi Arabian Amiantit Co.	28.50	-1.7%	30.7%	24.33
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.	41.95	41.95	0.0%	127.63	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Saudi Arabian Cooperative Insurance Co.	24.36	24.36	0.0%	91.60	BinDawood Holding Co.	108.40	105.60	2.7%	15.95
Saudi Chemical Co.	39.00	39.05	-0.1%	98.55	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	111.21
Eastern Province Cement Co.	52.00	52.30	-0.6%	6.71	Saudi Airlines Catering Co.	75.80	69.00	9.9%	17.64
Middle East Paper Co.	23.50	23.64	-0.6%	133.40	Bonyan REIT Fund	8.95	7.98	12.2%	0.09

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
RMB Holdings Ltd	1.66	18.6%	18.6%	127.83	Investec Ltd (JSE)	43.63	-7.6%	15.9%	103.18
Gold Fields	144.38	2.0%	5.0%	990.74	Investec Plc	41.63	-7.5%	13.6%	128.78
Naspers Ltd	3453.56	1.7%	14.4%	6014.67	Sibanye Stillwater	67.56	-4.8%	12.6%	1818.04
Reinet Investments (JSE) SCA	278.75	1.4%	1.1%	152.88	Northam Platinum	244.76	-3.9%	16.8%	509.03
Mr Price Group	187.57	1.4%	9.9%	423.67	Sasol Limited	216.65	-3.8%	61.8%	966.41
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)
Shoprite Limited	157.31	161.84	-2.8%	502.79	Brit.Amer.Tobacco (JSE)	570.44	491.11	16.2%	526.12
Mr Price Group	187.57	194.20	-3.4%	423.67	Clicks Group	238.88	201.33	18.7%	528.24
Anglo American Platinum	2115.42	2224.00	-4.9%	739.50	Spar Group	195.53	161.03	21.4%	308.12
Mondi (JSE)	376.36	396.98	-5.2%	168.16	Reinet Investments (JSE) SCA	278.75	225.03	23.9%	152.88
Vodacom Group	132.10	139.35	-5.2%	466.57	Vodacom Group	132.10	106.36	24.2%	466.57

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Faros Construction	4020.00	5.2%	58.9%	66616.00	Vietcombank	94200.00	-3.4%	-3.8%	152392.00
Refrigeration Electrical Engn	56200.00	3.9%	14.8%	92899.01	Vietjet Aviation	130500.00	-3.3%	4.4%	122945.00
Vietnam Export Import Commercial	19700.00	2.9%	2.3%	21081.01	Vincom Retail	34000.00	-2.9%	8.3%	339491.10
Vingroup JSC	108400.00	1.7%	0.2%	174412.00	No Va Land Invest	79000.00	-2.7%	21.1%	260723.00
Hoa Phat Group JSC	47150.00	1.2%	13.8%	867124.00	Vietnam National Petroleum Group	56300.00	-2.4%	3.1%	252613.00
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)
Techcombank	42000.00	42150.00	-0.4%	310199.00	Vietjet Aviation	130500.00	93200.00	40.0%	122945.00
Military Commercial Bank	29200.00	29350.00	-0.5%	289141.00	Vietnam Export Import Commercial	19700.00	14000.00	40.7%	21081.01
Hoa Phat Group JSC	47150.00	47450.00	-0.6%	867124.00	Vinamilk	101700.00	69750.03	45.8%	238132.00
Vietnam Prosperity	45200.00	45850.00	-1.4%	130768.00	Bank for Inv. and Devp	45000.00	29500.00	52.5%	130006.00
FPT Corp	79800.00	81500.00	-2.1%	179559.00	Vingroup JSC	108400.00	68000.00	59.4%	174412.00

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