

Daily Market Report

23 March 2021

JSE

JSE All-Share Index was closed on Monday on account of Human Rights Day.

BRVM

BRVM Composite Index closed at 141.71 points, up by 0.02% on Monday, with Bank of Africa - Côte d'Ivoire and Sicable Côte d'Ivoire being the top gainers.

NSE

NSE All-Share Index climbed 0.89% and closed at 38,722.87 points on Monday, as the industrial, insurance, consumer goods and oil & gas sectors recorded gains.

EGX

EGX 30 Index declined by 2.45% and closed at 10,537.22 points on Monday, as the market lost LE 7.27 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 869.88 points on Monday, as it declined 0.37%.

Capital Markets

JSE

Johannesburg Stock Exchange ⇄ 0.00%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.02%

NSE

Nigerian Stock Exchange ▲ 0.89%

EGX

Egyptian Stock Exchange ▼ 2.45%

ESG

Casablanca Stock Exchange ▼ 0.37%

African Markets

Nigeria: NSE 30 climbed by 1.18% and closed at 1,538.43 points on Monday. Stanbic IBTC and Julius Berger were the top gainers.

Egypt: EGX 30 Index declined by 2.45% and closed at 10,537.22 points on Monday, as the market lost LE 7.27 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index decreased by 0.12% and closed at 1,931.35 points on Monday. Stanbic Holdings and Kenya Power & Lighting were the top losers.

South Africa: JSE Top 40 Index was closed on Monday on account of Human Rights Day.

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00

INTERBANK RATES

OBB	14.50 ▼
Overnight	14.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General Index rose by 0.18% to close at 5,733.44 points on Monday, as First Abu Dhabi Bank and ALDAR properties recorded gains. MSCI UAE Index declined by 1.19% to close at 348.20 points.

Vietnam: VN-30 Index decreased by 0.40% to close at 1,198.54 points on Monday, as blue-chip stocks recorded losses. MSCI Vietnam Index increased 0.17% to close at 913.75 points.

Saudi Arabia: Tadawul All Share Index increased by 0.51% to close at 9,547.42 points on Monday, as gains in the Financial sector pushed shares higher. MSCI Tadawul 30 Index increased 0.55% to close at 1,282.01 points.

India: Nifty 50 Index edged 0.05% lower to close at 14,736.40 points on Monday, as losses in the Banking, Consumer Durables and Public Sector Undertakings sectors pushed the shares lower. MSCI India Index increased 0.38% to close at 1,687.24 points.

News

Nigeria:

FG Earmarks \$1bn Syndicated-term Loan to Boost MSMEs
Nigeria suspends Emirates flights over COVID-19 tests
NNPC Streamlines Measures to Achieve \$10/bl Production Cost Target

Kenya:

Kenya now eyes UK talks on free trade in services
Cash in circulation falls 3pc on January schools spending
Foreign investors snap two-week selling run at NSE

Page 1 of 4

Abu Dhabi:

UAE set for giant industrial leap under 'Operation Dh300 billion'
Etisalat Group inks partnership with Japan's Rakuten Mobile
Dubai's CPI dropped in Feb; stable prices in health, education sector

Saudi Arabia:

Saudi Aramco's debt-to-equity ratio more than doubles in 2020
Islamic Development Bank hires banks for dollar sustainability sukuk
Saudi fintech Geidea gets SAMA license to process payments

Egypt:

Oil Min., Shell Egypt signs 2 agreements for investments in west Mediterranean
Midor Refinery invests \$2.3B in new expansions
EgyptAir to seek up to \$447mln in state support, says CEO

South Africa:

Northam to rev up output to cash in on 'best decade yet' for PGMs
Metair may scrap its plans to split into two New fund to promote renewable energy enterprises

India:

Government to borrow Rs 20K cr less this fiscal; RBI cancels debt auction
Piramal raises Rs 4k cr, to reverse merge DHFL
Sebi relaxes valuation norms for some bonds after push back

Vietnam:

Regulation on goods exempted from export, import tariffs under int'l treaties
Hà Nội to organise five goods weeks to stimulate consumption
House prices rise despite of COVID-19 impact

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,733.44	0.2%	-0.04%	1.2%	13.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,537.22	-2.5%	-3.5%	-8.6%	-2.8%	EGP/USD	15.76	0.5%	0.2%
India	14,736.40	-0.1%	-0.1%	1.4%	5.4%	INR/USD	72.37	-0.2%	-1.0%
Kenya	1,931.35	-0.1%	-0.1%	0.8%	3.4%	KES/USD	109.85	0.0%	0.6%
Nigeria	1,538.43	1.2%	1.2%	-3.5%	-6.2%	NGN/USD	411.75	0.3%	4.3%
Saudi Arabia	9,547.42	0.5%	0.6%	4.4%	9.9%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,313.40	0.0%	0.0%	-0.7%	10.9%	ZAR/USD	14.71	-0.2%	0.1%
Vietnam	1,198.54	-0.4%	-0.4%	2.1%	11.9%	VND/USD	23,077.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	578.03	0.1%	0.1%	0.7%	1.1%	Brent Crude (\$)	64.09	-1.1%	23.5%
MSCI Frontier 100	1,301.31	-0.1%	-0.1%	1.4%	3.4%	Gold (\$)	1,740.01	0.3%	-8.3%
MSCI Emerging	1,336.27	0.0%	0.0%	-0.2%	3.5%	Copper (\$)	9,116.25	0.5%	17.6%
MSCI World (USD)	2,809.65	0.5%	0.5%	3.0%	4.4%	Coffee (\$)	119.3	-0.9%	0.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Stanbic IBTC	44.00	10.0%	-0.1%	1.04	FBNH	7.25	-0.7%	1.4%	57.59
Julius Berger	18.70	10.0%	5.1%	2.59	Dangote Sugar	16.95	-0.3%	-3.7%	10.51
UACN	8.00	6.7%	10.3%	4.10					
International Breweries	5.40	5.9%	-9.2%	4.06					
Ecobank	5.10	5.2%	-15.0%	8.09					
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%	0.03	UBN	5.30	4.65	14.0%	6.04
Total	142.00	143.00	-0.7%	0.21	Julius Berger	18.70	14.90	25.5%	2.59
Okomu Oil	90.00	93.00	-3.2%	13.11	P Z Cussons	4.85	3.80	27.6%	0.49
Seplat Petroleum	550.00	583.00	-5.7%	246.86	Ecobank	5.10	3.90	30.8%	8.09

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Zee Stores PJSC	10.46	2.1%	-0.4%	15.56	Dana Gas PJSC	0.75	-2.7%	5.0%	20.99
Waha Capital	1.20	1.7%	0.0%	0.86	Sudatel Telecom	0.38	-1.5%	-7.5%	0.19
Abu Dhabi Aviation	4.37	1.6%	20.7%	0.33	Du	7.10	-1.4%	23.5%	3.80
National Takaful Company	0.90	1.1%	-10.0%	0.04	Ras Al Khaimah Ceramics	1.78	-1.1%	18.7%	0.44
Arkan Building Materials	0.79	1.0%	-9.9%	0.00	Gulf Pharma Ind.	1.24	-0.8%	-6.8%	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
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£)
Edita Food Industries S.A.E	8.32	1.5%	-6.5%	8.85	Alexandria Mineral Oils Company	2.66	-7.3%	-14.7%	5.08
Ibnsina Pharma	4.34	0.9%	-14.7%	30.02	Citadel Capital - Common Shares	1.23	-5.9%	-14.1%	11.46
					Orascom Financial Holding	0.29	-5.6%	-40.2%	10.54
					Eastern Company	11.72	-5.6%	-10.1%	19.92
					Orascom Investment Holding	0.30	-5.4%	-46.4%	15.55
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	1.15	1.17	-2.2%	0.82	Credit Agricole Egypt	23.12	22.99	0.6%	1.21
Six of October Development & Investment (SODIC)	16.36	17.40	-6.0%	1.48	Ibnsina Pharma	4.34	4.18	3.8%	30.02
Sidi Kerir Petrochemicals	10.37	11.67	-11.1%	6.46	Orascom Financial Holding	0.29	0.27	4.0%	10.54
Palm Hills Dev. Company	1.63	1.83	-11.1%	5.16	Commercial International Bank (Egypt)	59.12	55.75	6.0%	86.08
Egyptian Financial Group-Hermes Holding Company	14.05	16.10	-12.7%	22.18	Edita Food Industries S.A.E	8.32	7.76	7.2%	8.85

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	721.90	5.2%	49.2%	7020.390	Indusind Bank	968.15	-4.3%	8.2%	6833.72
Britannia Inds.	3564.40	2.8%	-0.3%	4538.87	Power Grid Corp Of India	223.55	-2.9%	17.8%	9031.70
Tata Consultancy Svs.	3129.65	2.6%	9.3%	17613.98	Icici Bank	573.45	-2.3%	7.2%	16872.70
Tech Mahindra	1013.55	2.4%	4.1%	6135.25	Tata Motors	303.05	-1.9%	64.8%	33207.04
Sun Pharm.Industries	591.00	2.2%	-0.2%	3565.87	Hdfc Bank	1469.15	-1.9%	2.3%	15789.05
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	445.30	449.00	-0.8%	4792.85	Coal India	135.65	109.55	23.8%	4560.66
Grasim Industries	1413.90	1428.00	-1.0%	3391.37	HUL	2353.20	1850.00	27.2%	12264.52
UPL	628.15	639.55	-1.8%	5093.33	Bharti Airtel	528.00	394.00	34.0%	25818.11
Infosys	1370.80	1406.00	-2.5%	17111.33	Nestle India Limited	16588.05	12200.00	36.0%	3272.90
Ultratech Cement	6728.00	6944.20	-3.1%	4285.80	Indian Oil	99.15	71.15	39.4%	3377.79

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	5.76	4.5%	-4.0%	0.40	Stanbic Holdings	82.52	-3.2%	-2.9%	1.82
Nation Media Group	19.00	2.4%	22.9%	0.90	Kenya Power & Lighting Limited	1.33	-2.2%	-22.2%	5.24
Centum Investment Company Plc	16.70	1.2%	4.2%	1.84	Kenya Reinsurance Corporation Ltd	2.61	-1.5%	12.5%	0.04
Safaricom Plc	38.88	0.8%	13.5%	123.20	NIC Group Plc	24.67	-1.1%	-7.7%	0.51
Kengen Limited	4.64	0.2%	-1.5%	0.53	KCB Group Plc	40.89	-1.1%	7.3%	18.10
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)
Safaricom Plc	38.88	39.25	-0.9%	123.20	Standard Chartered Bank Kenya Ltd	133.01	132.00	0.8%	6.61
The Cooperative Bank of Kenya Ltd	13.86	14.05	-1.4%	4.30	Total Kenya Ltd	23.02	21.00	9.6%	0.01
British American Tobacco Kenya Ltd	481.84	500.00	-3.6%	0.19	Centum Investment Company Plc	16.70	15.15	10.2%	1.84
Equity Group Holdings Plc	41.40	43.00	-3.7%	81.96	Absa Bank Kenya	9.38	8.50	10.4%	0.16
KCB Group Plc	40.89	42.50	-3.8%	18.10	Stanbic Holdings	82.52	72.25	14.2%	1.82

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.	177.40	8.7%	68.6%	1535.31	Al Yamamah Steel Industries Co.	40.65	-3.9%	37.1%	177.11
Rabigh Refining and Petrochemical Co.	17.14	4.0%	24.0%	181.95	Etihad Atheeb Telecom. Co.	40.50	-3.5%	266.2%	103.57
Tourism Enterprise Co.	57.50	3.6%	4.5%	117.79	Wafrah for Industry and Development	181.00	-3.2%	17.5%	261.35
Aseer Trading, Tourism and Manufacturing Co.	22.98	3.5%	40.1%	384.46	Saudi Enaya Coop. Insurance Co.	43.10	-3.1%	24.9%	42.22
United Electronics Co.	100.60	3.3%	16.3%	166.70	SABB Takaful Co.	31.55	-2.9%	2.9%	32.18
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.	40.50	40.50	0.0%	103.57	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Saudi Arabian Cooperative Insurance Co.	23.92	23.92	0.0%	48.67	BinDawood Holding Co.	107.40	105.60	1.7%	30.49
Riyad Bank	22.48	22.50	-0.1%	22.17	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.0
Derayah REIT Fund	11.76	11.80	-0.3%	1.53	Saudi Airlines Catering Co.	76.00	69.00	10.1%	14.44
Saudi Chemical Co.	38.85	39.05	-0.5%	28.24	Bonyan REIT Fund	8.95	7.98	12.2%	0.48

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

*Market closed on 22/3

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Faros Construction	4300.00	7.0%	70.0%	66616.00	Cotec Construction	76000.00	-2.3%	-2.2%	42528.00
Vietcombank	97000.00	3.0%	-0.9%	152392.00	Sai Gon Thuong Tin Commercial	19200.00	-2.0%	13.6%	479417.10
No Va Land Invest	80800.00	2.3%	23.8%	260723.00	Military Commercial Bank	28650.00	-1.9%	25.7%	289141.00
Thanh Thanh Cong Tay Ninh	23500.00	2.2%	12.2%	125959.00	Vietnam Export Import Commercial	19350.00	-1.8%	0.5%	21081.01
BaoViet Holdings	62200.00	2.0%	-5.8%	191794.00	Techcombank	41300.00	-1.7%	31.1%	310199.00
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)
Hoa Phat Group JSC	46750.00	47450.00	-1.5%	867124.00	Vietnam Export Import Commercial	19350.00	14000.00	38.2%	21081.01
Vietnam JSC Bank	41100.00	41750.00	-1.6%	335902.00	Vietjet Aviation	132700.00	93200.00	42.4%	122945.00
Techcombank	41300.00	42150.00	-2.0%	310199.00	Vinamilk	100800.00	69750.03	44.5%	238132.00
Vietnam Prosperity	44900.00	45850.00	-2.1%	130768.00	Bank for Inv. and Devp	44650.00	29500.00	51.4%	130006.00
Military Commercial Bank	28650.00	29350.00	-2.4%	289141.00	Vingroup JSC	107300.00	68000.00	57.8%	174412.00

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