

Daily Market Report

24 March 2021

JSE

JSE All-Share Index decreased 0.90% to close at 65,318.52 points on Tuesday, as the Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 140.43 points, down by 0.90% on Tuesday, with Nsia Banque Côte d'Ivoire and Sior Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index declined marginally by 0.05% and closed at 38,704.97 points on Tuesday, as the banking sector recorded losses.

EGX

EGX 30 Index declined by 0.63% and closed at 10,471.36 points on Tuesday, as the market lost LE 7.56 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index closed at 863.86 points on Tuesday, as it declined 0.69%.

African Markets

Nigeria: NSE 30 decreased by 0.13% and closed at 1,536.46 points on Tuesday. Ecobank and Flour Mills were the top losers.

Egypt: EGX 30 Index declined by 0.63% and closed at 10,471.36 points on Tuesday, as the market lost LE 7.56 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index slipped by 0.001% and closed at 1,931.34 points on Tuesday. Total Kenya and WPP Scangroup were the top losers.

South Africa: JSE Top 40 Index declined 0.86% to close at 59,793.26 points on Tuesday, as the Resources sector recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.90%

BRVM

Bourse Régionale des Valeurs Mobilières

▼ 0.90%

NSE

Nigerian Stock Exchange

▼ 0.05%

EGX

Egyptian Stock Exchange

▼ 0.63%

ESG

Casablanca Stock Exchange

▼ 0.69%

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00

INTERBANK RATES

OBB	11.50 ▼
Overnight	12.00 ▼

Other Emerging Markets

Abu Dhabi: ADX General Index edged 0.03% higher to close at 5,735.39 points on Tuesday, as International Holdings Company and Abu Dhabi National Oil Company recorded gains. MSCI UAE Index declined 0.61% to close at 346.06 points.

Vietnam: VN-30 Index decreased by 0.96% to close at 1,186.98 points on Tuesday, as blue-chip stocks recorded losses. MSCI Vietnam Index declined 0.83% to close at 906.17 points.

Saudi Arabia: Tadawul All Share Index declined 0.61% to close at 9,489.63 points on Tuesday, as losses in the Petrochemicals, Building & Construction and Cement sectors pushed the shares lower. MSCI Tadawul 30 Index fell by 0.67% to close at 1,273.44 points.

India: Nifty 50 Index increased 0.53% to close at 14,814.75 points on Tuesday, as gains in the Banking, Real Estate and Power sectors pushed the shares higher. MSCI India Index climbed 0.52% to close at 1,695.96 points.

News

Nigeria:

CBN retains lending rate at 11.5%
Banks cut borrowings from CBN by N1.56tn
Dangote Cement's annual profit jumps to N278.1bn

Kenya:

Absa Kenya withholds dividend after 44pc profit drop
Equity's sixth loan deal tips SME kitty over Sh60bn
Private sector credit growth jumps to near five-year high

Abu Dhabi:

ADNIC shareholders to get \$54mln dividends, as profits rise 30%
Abu Dhabi Private Equity Firm Buys Two U.S. Healthtech Companies
Mubadala and Abu Dhabi Catalyst Partners invest \$150 million in Telegram

Saudi Arabia:

Aramco likely to partner with China on blue hydrogen, CEO Says
Saudi Arabia's National Water Company issues third O&M tender
Saudi Railway inks 5-year Makkah O&M service agreement

Egypt:

Egypt's stock exchange suspends trading after EGX100 falls by 5%
Trading on Egypt's commodities exchange to start at end of 2021
Egypt identifies 1.1K unlicensed markets, allocates LE44B for development

South Africa:

Old Mutual restores dividend despite annual loss
Investec flags 29% earnings drop, shares decline
Steinhoff's insurers agree to pay \$93 million to settle certain claims

India:

Bad loans to rise by Rs 1.3L cr after SC's nod for NPA tag
Government to sell 15% stake in Rail Vikas Nigam Ltd via OFS
Scheduled international flight suspension extended till April-end

Vietnam:

Vietnamese companies boost exports through global e-commerce platforms
Airlines forecast to lose over 15 trillion VND in 2021
Trade ties between VN and Canada develop due to CPTPP

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,735.39	0.0%	-0.01%	1.3%	13.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,471.36	-0.6%	-4.1%	-9.1%	-3.4%	EGP/USD	15.76	0.0%	0.2%
India	14,814.75	0.5%	0.5%	2.0%	6.0%	INR/USD	72.42	0.1%	-0.9%
Kenya	1,931.34	0.0%	-0.1%	0.8%	3.4%	KES/USD	109.85	0.0%	0.6%
Nigeria	1,536.46	-0.1%	1.1%	-3.6%	-6.3%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	9,489.63	-0.6%	0.04%	3.8%	9.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,793.26	-0.9%	-0.9%	-1.6%	10.0%	ZAR/USD	14.72	0.1%	0.2%
Vietnam	1,186.98	-1.0%	-1.4%	1.1%	10.9%	VND/USD	23,074.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	575.38	-0.5%	-0.3%	0.2%	0.7%	Brent Crude (\$)	60.89	-5.8%	17.3%
MSCI Frontier 100	1,295.78	-0.4%	-0.5%	0.9%	3.0%	Gold (\$)	1,727.67	-0.6%	-9.0%
MSCI Emerging	1,323.77	-0.9%	-1.0%	-1.2%	2.5%	Copper (\$)	8,979.00	-1.5%	15.9%
MSCI World (USD)	2,788.01	-0.8%	-0.3%	2.2%	3.6%	Coffee (\$)	120.36	0.9%	1.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Cap	22.00	10.0%	10.0%	0.73	Ecobank	4.80	-5.9%	-20.0%	5.74
Julius Berger	20.55	9.9%	15.4%	8.92	Transnational Corporation	0.81	-2.4%	-10.0%	19.47
Nigerian Breweries	48.00	2.1%	-14.3%	9.76	Flour Mills	29.00	-2.4%	11.5%	20.30
Access	8.25	1.2%	-2.4%	21.31	Zenith	22.00	-2.2%	-11.3%	562.47
Axamansard	1.00	1.0%	-4.8%	8.64	FCMB	2.93	-1.3%	-12.0%	0.59
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Airtel Africa	930.00	930.00	0.0%	0.04	Transcorp Hotels	3.25	3.25	0.0%	0.0
Total	142.00	143.00	-0.7%	0.85	UBN	5.30	4.65	14.0%	423.43
Guinness	25.10	25.30	-0.8%	14.65	Ecobank	4.80	3.90	23.1%	5.74
Okomu Oil	90.00	93.00	-3.2%	0.62	P Z Cussons	4.85	3.80	27.6%	2.63
Seplat Petroleum	550.00	583.00	-5.7%	1.34	Custodian	6.00	4.55	31.9%	5.74

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Commercial Bank Intl	0.70	7.7%	-6.7%	0.01	Al Qudra Holding	0.95	-5.0%	-13.6%	0.34
National Bank of Ras Al Khaimah	4.00	5.3%	2.6%	90.07	Zee Stores PJSC	10.00	-4.4%	-4.8%	15.94
Abu Dhabi National Takaful	6.30	5.0%	61.5%	3.27	Easy Lease Motor Cycle Rental PSC	23.00	-3.7%	30.7%	2.38
Eshraq Investments	0.35	2.6%	11.3%	2.85	Waha Capital	1.18	-1.7%	-1.7%	0.77
Abu Dhabi Ship Building	2.05	2.0%	-12.0%	1.22	Ooredoo QPSC	6.86	-1.6%	-8.8%	9.20
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%	0.00	Sharjah Insurance	2.11	2.11	0.0%	0.00
The National Investor PRJSC	0.65	0.65	0.0%	0.00	Al Buhaira Ntl Ins.	1.70	1.70	0.0%	0.00
United Fidelity Ins. Co.	2.00	2.00	0.0%	0.00	Insurance House	0.81	0.81	0.0%	0.00
Sharjah Group Co.	0.85	0.85	0.0%	0.00	Al Khazna Insurance Co	1.00	1.00	0.0%	0.00
Ras Al Khaimah National Ins.	3.75	3.75	0.0%	0.00	Al Ain Ahlia Ins.	33.00	33.00	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
CI Capital Holding For Financial Investments	3.33	3.4%	-16.5%	3.67	Citadel Capital - Common Shares	1.16	-5.8%	-19.1%	14.23
Orascom Development Egypt	5.45	3.0%	11.2%	1.77	Orascom Financial Holding	0.27	-5.2%	-43.3%	11.82
GB AUTO	3.80	2.7%	14.5%	4.65	Export Dev. Bank of Egypt (EDBE)	11.57	-5.1%	-19.1%	6.18
Fawry For Banking Technology And Electronic Payment	32.98	1.9%	26.2%	41.10	Orascom Investment Holding	0.29	-4.4%	-48.7%	27.15
Telecom Egypt	10.33	0.6%	-13.4%	13.73	Eastern Company	11.23	-4.2%	-13.9%	51.70
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	1.13	1.17	-3.5%	1.76	Credit Agricole Egypt	23.14	22.55	2.6%	2.06
Six of October Development & Investment (SODIC)	16.38	17.40	-5.9%	3.02	Orascom Financial Holding	0.27	0.26	4.6%	11.82
GB AUTO	3.80	4.24	-10.4%	4.65	Ibnsina Pharma	4.28	4.06	5.4%	33.93
Orascom Development Egypt	5.45	6.23	-12.5%	1.77	Commercial International Bank	58.81	55.75	5.5%	67.48
Palm Hills Dev. Company	1.60	1.83	-12.6%	7.47	Edita Food Industries S.A.E	8.29	7.76	6.8%	2.47

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Shree Cement limited	28312.20	5.0%	17.9%	1219.087	Indian Oil	96.75	-2.4%	6.4%	2100.23
Ultratech Cement	6939.10	3.1%	31.2%	3135.57	Hindalco Industries	331.70	-2.4%	37.9%	2842.96
Divi's Laboratories Limited	3495.95	2.6%	-9.0%	2560.94	ONGC	107.15	-2.2%	15.2%	1738.19
Titan Company	1495.35	2.4%	-4.6%	1937.80	Power Grid Corp Of India	219.00	-2.0%	15.4%	3701.03
Adani Ports And Sez.	738.55	2.3%	52.7%	16277.83	Gail (India)	134.40	-1.8%	9.0%	2347.91
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Ultratech Cement	6939.10	6958.75	-0.3%	3135.57	HUL	2337.30	1902.00	22.9%	5770.03
Grasim Industries	1411.25	1428.00	-1.2%	2245.37	Coal India	135.25	109.55	23.5%	1552.51
Jsw Steel	441.80	449.00	-1.6%	3102.70	Bharti Airtel	529.25	394.00	34.3%	7031.85
UPL	633.35	643.95	-1.6%	3903.37	Indian Oil	96.75	71.15	36.0%	2100.23
Infosys	1371.55	1406.00	-2.5%	6593.61	Nestle India Limited	16681.35	12200.00	36.7%	1798.76

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Reinsurance Corporation Ltd	2.65	1.5%	14.2%	0.28	Total Kenya Ltd	21.83	-5.2%	-9.0%	0.09
Safaricom Plc	39.43	1.4%	15.1%	307.24	WPP Scangroup Plc	5.63	-2.3%	-6.2%	0.01
Bamburi Cement Limited	39.96	1.4%	5.5%	0.04	Diamond Trust Bank Limited	72.01	-2.0%	-3.9%	0.72
Standard Chartered Bank Kenya Ltd	134.68	1.3%	-6.6%	9.23	Stanbic Holdings	81.42	-1.3%	-4.2%	1.82
KCB Group Plc	41.20	0.8%	8.1%	18.22	The Cooperative Bank of Kenya Ltd	13.68	-1.3%	9.4%	3.22
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	39.43	39.50	-0.2%	307.24	Standard Chartered Bank Kenya Ltd	134.68	132.00	2.0%	9.23
The Cooperative Bank of Kenya Ltd	13.68	14.05	-2.6%	3.22	Total Kenya Ltd	21.83	21.00	4.0%	0.09
KCB Group Plc	41.20	42.50	-3.1%	18.22	Centum Investment Company Plc	16.60	15.15	9.6%	0.45
Equity Group Holdings Plc	41.66	43.00	-3.1%	94.11	Absa Bank Kenya	9.43	8.50	10.9%	5.80
British American Tobacco Kenya Ltd	480.00	500.00	-4.0%	0.39	WPP Scangroup Plc	5.63	5.04	11.7%	0.01

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Swicorp Wabel REIT Fund	8.14	10.0%	9.9%	24.24	Al-Etihaad Cooperative Insurance Co.	23.78	-7.7%	-3.3%	118.36
MEFIC REIT Fund	7.95	10.0%	10.3%	155.76	Tabuk Cement Co.	19.50	-3.6%	14.4%	29.68
Al Mashaar REIT	8.39	8.3%	4.9%	61.48	Red Sea International Co.	27.65	-3.0%	24.4%	17.29
Jadwa REIT Al Haramain Fund	7.93	5.9%	6.2%	56.37	National Industrialization Co.	15.38	-2.7%	12.4%	115.90
Taleem REIT Fund	14.84	3.9%	15.2%	24.36	Saudi Kayan Petrochemical Co.	15.56	-2.6%	8.8%	88.77
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.	39.60	39.60	0.0%	86.19	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Riyad Bank	22.54	22.58	-0.2%	59.56	BinDawood Holding Co.	108.20	105.60	2.5%	13.73
United International Transportation Co.	47.15	47.35	-0.4%	63.29	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.0
Eastern Province Cement Co.	51.80	52.30	-1.0%	14.74	Saudi Airlines Catering Co.	77.00	69.60	10.6%	30.92
Northern Region Cement Co.	13.08	13.30	-1.7%	75.80	Bonyan REIT Fund	9.00	7.98	12.8%	23.29

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Reinet Investments (JSE) SCA	291.15	4.4%	5.6%	152.15	Redefine Properties	3.47	-6.7%	4.2%	144.04
Brit.Amer.Tobacco (JSE)	586.87	2.9%	7.6%	619.69	Anglogold Ashanti	308.76	-4.7%	-9.9%	416.51
Multichoice Group	128.25	1.9%	-4.3%	152.31	Sibanye Stillwater	64.75	-4.2%	7.9%	1231.51
Prosus (JSE)	1665.33	1.9%	3.7%	697.78	Old Mutual Limited	11.93	-4.1%	0.3%	280.99
Naspers Ltd	3497.80	1.3%	15.8%	5360.41	Aspen Phmc.R.Hdg.	141.14	-4.0%	12.6%	211.69
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	156.24	161.84	-3.5%	260.01	Anglogold Ashanti	308.76	285.13	8.3%	416.51
Mondi (JSE)	374.95	396.98	-5.5%	198.67	Brit.Amer.Tobacco (JSE)	586.87	496.01	18.3%	619.69
Mr Price Group	182.06	194.20	-6.3%	288.50	Clicks Group	239.84	201.33	19.1%	411.38
Anglo American Platinum	2076.32	2224.00	-6.6%	494.11	Spar Group	193.74	161.03	20.3%	153.50
MTN Group	85.50	92.56	-7.6%	757.18	Vodacom Group	128.46	106.36	20.8%	311.84

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Faros Construction	4450.00	3.5%	75.9%	188587.00	Bank for Inv. and Devp	43700.00	-2.1%	-8.8%	114710.00
Vietnam National Petroleum Group	57200.00	2.1%	4.8%	54205.01	Sai Gon Thuong Tin Commercial	18800.00	-2.1%	11.2%	633422.10
Petrovietnam Gas	91800.00	1.4%	6.0%	46317.01	Techcombank	40450.00	-2.1%	28.4%	438236.90
PetroVietnam Fertilizer Chem	19600.00	0.5%	4.3%	43003.01	Masan Group Corp	86500.00	-1.8%	-2.7%	63818.00
FPT Corp	78800.00	0.1%	33.3%	164371.00	Vietnam Export Import Commercial	19000.00	-1.8%	-1.3%	6947.00
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	46600.00	47450.00	-1.8%	519461.10	Vietnam Export Import Commercial	19000.00	14000.00	35.7%	6947.00
Vietnam Prosperity	44500.00	45850.00	-2.9%	192731.00	Vietjet Aviation	131000.00	93200.00	40.6%	67217.01
Vietnam JSC Bank	40500.00	41750.00	-3.0%	851384.10	Vinamilk	100200.00	69750.03	43.7%	345498.90
FPT Corp	78800.00	81500.00	-3.3%	164371.00	Bank for Inv. and Devp	43700.00	29500.00	48.1%	114710.00
Military Commercial Bank	28350.00	29350.00	-3.4%	450298.10	Vingroup JSC	106500.00	68000.00	56.6%	104572.00

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