

Daily Market Report

26 March 2021

JSE

JSE All-Share Index decreased 0.73% to close at 64,783.62 points on Thursday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 139.62 points, down by 0.53% on Thursday, with Palm Côte d'Ivoire and Sode Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index rose 0.53% and closed at 39,293.14 points on Thursday, as the Insurance, Banking and Industrial sectors recorded gains.

EGX

EGX 30 Index jumped 1.57% and closed at 10,870.46 points on Thursday, as the market added LE 6 billion of market cap, amid Egyptian and foreign buying.

ESG

Casablanca ESG 10 Index closed at 875.17 points on Thursday, as it increased 0.55%.

African Markets

Nigeria: NSE 30 increased by 0.65% and closed at 1,563.93 points on Thursday. Stanbic IBTC and Sterling were the top gainers.

Egypt: EGX 30 Index jumped 1.57% and closed at 10,870.46 points on Thursday, as the market added LE 6 billion of market cap, amid Egyptian and foreign buying.

Kenya: NSE 20 Index declined by 0.15% and closed at 1,907.32 points on Thursday. Kenya Reinsurance Corporation and NIC Group were the top losers.

South Africa: JSE Top 40 Index fell 0.82% to close at 59,278.89 points on Thursday, as all the sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.73%

BRVM

Bourse Régionale des Valeurs Mobilières

▼ 0.53%

NSE

Nigerian Stock Exchange

▲ 0.53%

EGX

Egyptian Stock Exchange

▲ 1.57%

ESG

Casablanca Stock Exchange

▲ 0.55%

Nigeria Key Indicators

	Current
Inflation	17.33%
Exchange Rate	₦ 379.00
INTERBANK RATES	
OBB	15.50 ▲
Overnight	15.75 ▲

Other Emerging Markets

Abu Dhabi: ADX General Index fell 0.32% to close at 5,726.61 points on Thursday, as Abu Dhabi National Oil Company and Etisalat recorded losses. MSCI UAE Index declined 0.54% to close at 343.52 points.

Vietnam: VN-30 Index decreased by 0.08% to close at 1,164.64 points on Thursday, as blue-chip stocks recorded losses. MSCI Vietnam Index increased 0.18% to close at 896.22 points.

Saudi Arabia: Tadawul All Share Index declined 0.49% to close at 9,417.71 points on Thursday, as Telecom & IT, Cement and Financial Services sectors recorded losses. MSCI Tadawul 30 Index fell by 0.66% to close at 1,261.74 points.

India: Nifty 50 Index declined 1.54% to close at 14,324.90 points on Thursday, as losses in the Power, Auto and Real Estate sectors pulled shares lower. MSCI India Index fell 1.75% to close at 1,637.85 points.

News

Nigeria:

Ecobank Group posts N641.8 billion revenue in 2020
Petrol price hike imminent as NNPC declares N120bn subsidy unsustainable
Currency in circulation drops to N2.78tn

Kenya:

Standard Chartered's Profit Falls 34% as Loan Loss Provisions Soar
CIC Insurance Posts KSh297 Million Loss in 2020
KQ seeks Sh55bn bailout to navigate Covid storm

Page 1 of 4

Abu Dhabi:

Abu Dhabi's biggest hotel group reports profit decline but outlook improves
UAE tourism spending to top \$25.3bn by 2024
ADCB proposes Dh\$1.878 billion dividends

Saudi Arabia:

Saudi Arabia's oil exports fell 21% y-o-y in January
Saudi Bank AlBilad to issue \$800mln riyal-denominated sukuk
Saudi seeks \$420bn foreign investments in infrastructure and transportation

Egypt:

Finance Ministry: General budget deficit down 6.3% in 1H2020-21
Egypt's revenues hike to LE 453B in first half of 2020/2021
IFC, Egyptian Fintech Association partner to support entrepreneurship

South Africa:

Sarb holds repo rate at 3.5%
SA's \$67bn infrastructure drive gathers pace
Investec raises new R2.5bn debt facility for MetroFibre Network

India:

Sebi makes dividend distribution policy must for top-1,000 listed companies
Companies need to disclose crypto dealings under revised rules: Govt
NHAI to raise Rs 1 lakh crore through monetisation of highways in next 5 years

Vietnam:

VIB eyes over 7.5 trillion VND in pre-tax profit in 2021
Vietnam textile industry combats pandemic with PPE switch: Forbes
Ministry aiming to collect taxes from e-commerce sellers

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	5,726.61	-0.3%	-0.2%	1.1%	13.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,870.46	1.6%	-0.4%	-5.7%	0.2%	EGP/USD	15.72	-0.3%	-0.1%
India	14,324.90	-1.5%	-2.8%	-1.4%	2.5%	INR/USD	72.62	0.1%	-0.6%
Kenya	1,907.32	-0.1%	-1.4%	-0.4%	2.1%	KES/USD	109.75	0.0%	0.5%
Nigeria	1,563.93	0.6%	2.9%	-1.9%	-4.6%	NGN/USD	409.71	0.1%	3.8%
Saudi Arabia	9,417.71	-0.5%	-0.7%	3.0%	8.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,278.89	-0.8%	-1.7%	-2.4%	9.0%	ZAR/USD	15.06	1.2%	2.5%
Vietnam	1,164.64	-0.1%	-3.2%	-0.8%	8.8%	VND/USD	23,085.00	0.0%	0.0%

MSCI Emerging Markets

MSCI Frontier	571.46	-0.1%	-1.0%	-0.4%	0.0%	Brent Crude (\$)	62.46	-3.0%	20.4%
MSCI Frontier 100	1,287.84	-0.2%	-1.1%	0.3%	2.4%	Gold (\$)	1,730.71	-0.4%	-8.8%
MSCI Emerging	1,288.42	-0.8%	-3.6%	-3.8%	-0.2%	Copper (\$)	8,785.50	-2.1%	13.4%
MSCI World (USD)	2,775.06	0.3%	-0.8%	1.8%	3.2%	Coffee (\$)	117.88	-0.7%	-1.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Stanbic IBTC	52.90	9.2%	20.1%	126.13	Dangote Sugar	16.40	-2.7%	-6.8%	108.58
Sterling	1.68	9.1%	-17.6%	6.47	Transnational Corporation	0.80	-1.2%	-11.1%	6.18
Ecobank	4.90	4.3%	-18.3%	4.22	UBA	6.85	-0.7%	-20.8%	52.42
FCMB	2.98	1.7%	-10.5%	0.91	UACN	8.00	-0.6%	10.3%	18.32
Fidelity	2.32	1.3%	-7.9%	14.00					
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	27.30	27.30	0.0%	121.12	Transcorp Hotels	3.25	3.25	0.0%	0.03
Airtel Africa	930.00	930.00	0.0%	0.16	UBN	5.30	4.65	14.0%	420.53
Stanbic IBTC	52.90	53.25	-0.7%	126.13	Ecobank	4.90	3.90	25.6%	4.22
Total	142.00	143.00	-0.7%	7.13	P Z Cussons	4.85	3.80	27.6%	2.69
Okomu Oil	90.00	93.00	-3.2%	4.60	Wema	0.60	0.46	30.4%	0.97

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Arkan Building Materials	0.78	5.0%	-11.5%	0.11	Emirates Telecom	20.80	-2.7%	23.1%	33.76
Union Insurance Co	0.68	4.6%	-2.9%	0.29	Bank of Sharjah PJSC	0.58	-1.7%	-7.9%	0.25
REEM INVESTMENTS PrJSC	24.10	3.8%	9.5%	0.36	Manazel PJSC	0.35	-1.4%	-0.3%	0.46
International Holding	52.00	2.5%	23.8%	204.68	Abu Dhabi National Oil Co.	4.30	-1.1%	14.7%	177.03
Dana Gas PJSC	0.76	1.7%	7.1%	37.64	Abu Dhabi Ship Building	2.07	-1.0%	-11.2%	0.19
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%	0.00	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£)
Eastern Company	12.41	7.7%	-4.8%	46.44	Alexandria Mineral Oils Company	2.58	-2.6%	-17.3%	3.52
Fawry For Banking Tech And Electronic Payment	34.89	2.9%	33.5%	8.95	Sidi Kerir Petrochemicals	10.07	-2.2%	8.2%	1.58
Heliopolis Housing	4.69	2.6%	-23.1%	7.40	Export Development Bank of Egypt (EDBE)	11.92	-1.1%	-16.7%	2.46
CI Capital Holding For Financial Investments	3.49	2.0%	-12.5%	1.83	T M G Holding	6.31	-0.8%	-4.0%	2.81
Abou Kir Fertilizers	21.59	1.8%	4.4%	8.65	Orascom Financial Holding	0.27	-0.7%	-42.5%	5.96
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	-3.4%	0.38	Credit Agricole Egypt	23.15	22.55	2.7%	2.06
Six of October Development & Investment (SODIC)	16.34	17.40	-6.1%	0.28	Orascom Financial Holding	0.28	0.26	6.9%	9.31
Palm Hills Dev. Company	1.67	1.83	-9.0%	6.24	Commercial Intl. Bank (Egypt)	59.87	55.75	7.4%	67.48
GB AUTO	3.86	4.24	-9.0%	1.92	Emaar Misr for Dev.	2.32	2.14	8.4%	2.65
Oriental Weavers	7.18	8.06	-10.9%	7.52	Edita Food Industries S.A.E	8.48	7.76	9.3%	2.47

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	723.15	2.9%	12.4%	15002.630	Maruti Suzuki India	6786.85	-4.0%	-11.3%	3242.56
Icici Bank	571.55	0.7%	6.8%	13966.35	Indian Oil	90.90	-3.9%	-0.1%	1816.34
Dr Reddys Lab	4380.55	0.7%	-15.8%	3432.80	HUL	2237.05	-3.5%	-6.6%	4120.29
HDFC	2470.75	0.2%	-3.4%	7819.38	Coal India	128.10	-3.2%	-5.4%	1447.64
Jsw Steel	438.00	0.1%	13.1%	3412.50	Hero Motocorp	2941.65	-3.0%	-5.4%	2987.34
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	438.00	449.00	-2.4%	3412.50	Nestle India Limited	16170.10	14051.55	15.1%	1254.01
Grasim Industries	1372.75	1428.00	-3.9%	2078.18	Coal India	128.10	109.55	16.9%	1447.64
Ultratech Cement	6666.50	6958.75	-4.2%	4934.44	HUL	2237.05	1902.00	17.6%	4120.29
Infosys	1333.80	1406.00	-5.1%	8328.14	Indian Oil	90.90	71.15	27.8%	1816.34
Shree Cement limited	27580.35	29090.00	-5.2%	1764.62	Bharti Airtel	507.75	394.00	28.9%	5599.34

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.34	4.7%	-21.6%	1.02	Kenya Reinsurance Corporation Ltd	2.57	-3.0%	10.8%	0.63
Standard Chartered Bank Kenya Ltd	146.71	4.1%	1.7%	5.96	NIC Group Plc	22.94	-2.3%	-14.2%	1.62
Nairobi Securities Exchange Plc	8.03	1.3%	-1.7%	0.04	Centum Investment Company Plc	16.07	-1.4%	0.2%	0.74
Total Kenya Ltd	23.95	0.6%	-0.2%	0.08	Diamond Trust Bank Limited	70.01	-1.2%	-6.5%	2.00
KCB Group Plc	42.00	0.3%	10.2%	86.88	The Cooperative Bank of Kenya Ltd	13.56	-0.9%	8.5%	8.91
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)
Safaricom Plc	39.51	39.95	-1.1%	327.76	Absa Bank Kenya	8.94	8.50	5.2%	5.40
KCB Group Plc	42.00	42.50	-1.2%	86.88	Centum Investment Company Plc	16.07	15.15	6.1%	0.74
Equity Group Holdings Plc	41.83	43.00	-2.7%	137.11	Kengen Limited	4.58	4.25	7.8%	1.54
The Cooperative Bank of Kenya Ltd	13.56	14.05	-3.5%	8.91	WPP Scangroup Plc	5.51	5.04	9.3%	0.08
British American Tobacco Kenya Ltd	480.00	500.00	-4.0%	2.88	Standard Chartered Bank Kenya Ltd	146.71	132.00	11.1%	5.96

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
CHUBB Arabia Cooperative Insurance Co.	44.20	10.0%	36.2%	138.60	Swicorp Wabel REIT Fund	7.92	-4.1%	6.9%	20.38
Alinma Tokio Marine Co.	29.60	9.8%	21.4%	285.53	Wafrah for Industry and Development Co.	188.60	-2.8%	22.5%	360.29
Saudi Industrial Export Co.	130.60	8.8%	17.0%	404.93	Mobile Telecom. Co. Saudi Arabia	14.20	-2.5%	4.4%	129.41
Saudi Arabia Refineries Co.	187.20	5.2%	77.9%	1320.18	SABB Takaful Co.	32.00	-2.4%	4.4%	74.93
AXA Cooperative Insurance Co.	40.95	3.9%	14.7%	97.19	Jadwa REIT Al Haramain Fund	7.60	-2.2%	1.7%	9.62
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.	38.80	38.80	0.0%	66.35	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.0
Alinma Tokio Marine Co.	29.60	29.60	0.0%	285.53	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.0
United International Transportation Co.	47.50	47.80	-0.6%	47.74	BinDawood Holding Co.	110.00	105.60	4.2%	35.64
Najran Cement Co.	23.08	23.32	-1.0%	35.78	Saudi Airlines Catering Co.	76.00	70.00	8.6%	8.87
Saudi Industrial Export Co.	130.60	132.00	-1.1%	404.93	Bonyan REIT Fund	8.92	7.98	11.8%	1.56

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Multichoice Group	129.12	3.1%	-3.6%	173.10	Aspen PhmcR.Hdg.	136.25	-2.4%	8.7%	177.65
Impala Platinum	265.64	2.6%	31.6%	754.47	Anglo American (JSE)	555.07	-2.2%	14.4%	804.92
Northam Platinum	240.55	2.5%	14.8%	393.24	Sasol Limited	207.51	-2.2%	54.9%	376.51
Clicks Group	239.83	2.0%	-5.1%	260.39	Growthpoint Prop	12.82	-1.8%	2.0%	90.99
Nedbank Group	128.36	1.3%	-0.9%	299.96	Sanlam Limited	57.79	-1.8%	-1.6%	332.32
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)
Anglo American Platinum	2133.20	2224.00	-4.1%	671.57	Anglogold Ashanti	295.00	288.37	2.3%	595.24
Mondi (JSE)	379.00	396.98	-4.5%	203.82	Brit.Amer.Tobacco (JSE)	570.70	505.01	13.0%	466.50
Mr Price Group	184.80	194.20	-4.8%	471.55	Reinet Investments (JSE) SCA	286.09	247.21	15.7%	92.28
Shoprite Limited	153.29	161.84	-5.3%	235.66	Vodacom Group	128.33	108.00	18.8%	213.87
Vodacom Group	128.33	139.35	-7.9%	213.87	Clicks Group	239.83	201.33	19.1%	260.39

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Export Import Commercial	19000.00	2.7%	-1.3%	11368.00	Thanh Thanh Cong Tay Ninh	22150.00	-2.4%	5.7%	79682.00
Vingroup JSC	110400.00	2.3%	2.0%	115938.00	Faros Construction	4180.00	-2.3%	65.2%	101857.00
Sai Gon Thuong Tin Commercial	18750.00	1.9%	10.9%	427877.10	Vietnam Prosperity	43250.00	-1.9%	33.1%	164314.00
Phu Nhuan Jewelry	85000.00	1.1%	4.9%	55523.01	Vincom Retail	32850.00	-1.6%	4.6%	191394.00
Masan Group Corp	86000.00	1.1%	-3.3%	74260.00	Saigon Securities Inc	30800.00	-1.6%	-6.9%	425310.00
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)
Phu Nhuan Jewelry	85000.00	87500.00	-2.9%	55523.01	Vinamilk	98500.00	74000.03	33.1%	317073.90
No Va Land Invest	80000.00	83500.00	-4.2%	146390.00	Vietnam Export Import Commercial	19000.00	14000.00	35.7%	11368.00
Vingroup JSC	110400.00	116000.00	-4.8%	115938.00	Vietjet Aviation	128100.00	93200.00	37.4%	53450.00
Hoa Phat Group JSC	45000.00	47450.00	-5.2%	1082188.00	Bank for Inv. and Devp	42250.00	29500.00	43.2%	142838.00
PetroVietnam Fertilizer Chem	19350.00	20500.00	-5.6%	55423.01	Saigon Beer Alcohol	175000.00	120000.00	45.8%	8843.00

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