

# Daily Market Report

## 19 May 2021

### JSE

JSE All-Share Index increased by 0.06% to close at 67,254.94 on Tuesday, as the Financial and Resources sectors recorded gains.

### BRVM

BRVM Composite Index closed at 151.49 points, up by 0.62% on Tuesday, with Bernabe Côte d'Ivoire and Palm Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share decreased by 0.72% to close at 39,022.52 points on Tuesday, as the Industrial, Insurance, and Consumer goods sectors recorded losses.

### EGX

EGX 30 Index rose by 1.00% and closed at 10,780.90 points on Tuesday, as the market gained LE 8.04 billion of market cap, amid Egyptian and Arab purchases.

### ESG

Casablanca ESG 10 Index closed at 926.87 points on Tuesday, as it fell by 0.15%.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 0.06%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.62%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.72%
<b>EGX</b> Egyptian Stock Exchange	▲ 1.00%
<b>ESG</b> Casablanca Stock Exchange	▼ 0.15%

### African Markets

**Nigeria:** NSE 30 Index fell by 1.00% and closed at 1,555.92 points on Tuesday. BUA Cement and Fidelity were the top losers.

**Egypt:** EGX 30 Index rose by 1.00% and closed at 10,780.90 points on Tuesday, as the market gained LE 8.04 billion of market cap, amid Egyptian and Arab purchases.

**Kenya:** NSE 20 Index decreased by 0.89% and closed at 1,842.47 points on Tuesday. Nairobi Securities Exchange and Centum Investment Company were the top losers.

**South Africa:** JSE Top 40 Index inched down 0.01% to close at 61,189.94 on Tuesday, as the Industrial sector recorded losses.

### Nigeria Key Indicators

	Current
Inflation	18.12%
Exchange Rate	N/A
<b>INTERBANK RATES</b>	
OBB	12.75 ▼
Overnight	13.25 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX General rose 0.78% to close at 6,528.39 points on Tuesday, as First Abu Dhabi Bank and Etisalat recorded gains. MSCI UAE Index increased by 0.96% to close at 375.15 points.

**Vietnam:** VN-30 Index rose 0.53% to close at 1,378.59 points on Tuesday, as the blue chip companies recorded gains. MSCI Vietnam declined 0.26% to close at 988.47 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.26% to close at 10,423.51 points on Tuesday, as gains in IT, Banking, Media and Capital goods sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 0.29% to close at 1,407.64 points.

**India:** Nifty 50 increased by 1.24% to close at 15,108.10 points on Tuesday, as gains in the Banking, Metals, Auto and Financial Services sectors pushed the shares higher. MSCI India Index rose 1.21% to close at 1,743.19.

### News

#### Nigeria:

Shell in talks with Nigeria to divest onshore oil stakes  
Nigeria eyes \$3 billion Eurobond sale, seeks approval  
FMDQ Exchange admits Nigerian Breweries' commercial papers

#### Kenya:

Kenya to receive second tranche of Sh44bn IMF loan  
Cash-strapped banks step up push for State loans  
KenGen's US\$6.5 Million Djibouti Power Project begins Next Month

#### Abu Dhabi:

ADSB awarded Dh3.5b contract to build 4 patrol vessels  
Abu Dhabi-based Agthia Group acquires majority stake in Nabil Foods  
Etisalat to boost Abu Dhabi SMB's digital transformation journey

#### Saudi Arabia:

HSBC Saudi Arabia to transfer three units to SABB-owned Alawwal Invest  
Saudi Ultra-Luxury Project May Raise Up to \$2.7 Billion in 2022  
Saudi Arabia's \$500bn futuristic Neom mega-city to open first hotels by 2022

#### Egypt:

Egypt's bourse to receive from 2 to 3 offering before end of 2021  
Egypt's central bank issues LE 29B in T-bills, bonds Tuesday  
205% increase in Egypt's health sector investments for 2021/2022

#### South Africa:

Vodacom raises operating growth target on international business, Safaricom boost  
Moody's flags interest rates on government borrowing  
Rand oscillates above R14/\$

#### India:

Government to sell 1.95% stake in Axis Bank to raise Rs 4,000 cr  
Tata Motors hit by Rs 7.6k cr Q4 loss on Rs 15k cr charge  
Canara Bank sees Q4 profit of Rs 1,010 crore

#### Vietnam:

HCM City targets annual growth of 7% in collective economy  
Alibaba, Baring Private Equity Asia invest \$400m in Masan retail arm, The CrownX  
Foodstuff prices rise, pose inflation threat

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,528.39	0.8%	5.1%	7.4%	29.4%	AED/USD	3.67	0.0%	0.0%
Egypt	10,780.90	1.0%	0.1%	2.9%	-0.6%	EGP/USD	15.68	0.0%	-0.3%
India	15,108.10	1.2%	2.9%	3.3%	8.1%	INR/USD	73.04	-0.2%	0.0%
Kenya	1,842.47	-0.9%	-1.1%	-1.3%	-1.4%	KES/USD	107.50	0.2%	-1.6%
Nigeria	1,555.92	-1.0%	-1.7%	-2.7%	-5.1%	NGN/USD	408.75	0.0%	3.5%
Saudi Arabia	10,423.51	0.3%	1.0%	0.6%	20.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,189.94	-0.01%	1.0%	0.2%	12.5%	ZAR/USD	13.99	-0.9%	-4.8%
Vietnam	1,378.59	0.5%	-0.1%	5.1%	28.7%	VND/USD	23,042.00	0.0%	-0.2%

## MSCI Emerging Markets

MSCI Frontier	618.78	0.1%	0.4%	1.6%	8.2%	Brent Crude (\$)	68.71	-1.1%	32.41%
MSCI Frontier 100	1,386.64	0.0%	0.2%	2.4%	10.2%	Gold (\$)	1,868.10	0.3%	-1.6%
MSCI Emerging	1,333.18	1.7%	2.0%	-1.1%	3.2%	Copper (\$)	10,376.25	0.3%	33.9%
MSCI World (USD)	2,928.68	-0.2%	-0.3%	-0.3%	8.9%	Coffee (\$)	130.32	0.2%	9.3%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	3.57	9.8%	-0.8%	0.39	BUA Cement	72.60	-5.7%	-6.1%	223.25
Wema	0.58	5.5%	-15.9%	0.69	Fidelity	2.29	-3.8%	-9.1%	54.21
UBN	6.00	5.3%	12.1%	6.98	Sterling	1.54	-3.8%	-24.5%	2.03
P Z Cussons	5.30	1.9%	0.0%	5.56	FBNH	7.15	-2.7%	0.0%	27.13
Ecobank	5.40	1.9%	-10.0%	1.82	Transnational Corporation	0.86	-2.3%	-4.4%	9.60
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Total	145.00	145.00	0.0%	6.24	Transcorp Hotels	3.57	3.25	9.8%	0.39
Seplat Petroleum	620.00	620.00	0.0%	175.80	Wema	0.58	0.50	16.0%	0.69
Okomu Oil	96.50	96.50	0.0%	2.52	Unilever	12.60	10.50	20.0%	16.39
Airtel Africa	930.00	930.00	0.0%	0.07	11 Plc (Mobil)	219.00	173.40	26.3%	0.00
UACN	10.40	10.45	-0.5%	60.36	UBN	6.00	4.65	29.0%	6.98

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi Ship Building	2.34	14.7%	0.4%	7.14	RAK Co. for White Cement & Construction	0.82	-10.0%	-3.5%	0.00
PALMS SPORTS	14.40	10.8%	9.1%	8.08	Sharjah Cement	0.68	-10.0%	-10.0%	0.01
Sudatel Telecom	0.39	5.6%	-5.1%	0.23	Sharjah Insurance	1.60	-9.1%	-24.2%	0.04
Al Qudra Holding	0.95	5.6%	-13.6%	2.32	Al Ain Ahlia Ins.	31.20	-5.5%	-15.7%	1.17
Agthia Group	6.95	5.3%	63.5%	35.92	Abu Dhabi National for Building Materials	0.22	-5.2%	-16.2%	0.11
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	Al Ain Ahlia Ins.	31.20	31.20	0.0%	1.17
Al Khazna Insurance Company PSC	1.00	1.00	0.0%	0.00	Al Wathba National Ins.	5.85	5.85	0.0%	0.00
United Fidelity Ins. Co.	2.00	2.00	0.0%	0.00	Emirates Insurance Co.	6.50	6.50	0.0%	4.85
Sharjah Group Co.	0.85	0.85	0.0%	0.00	Insurance House	0.81	0.81	0.0%	0.00
National Corp for Tourism and Hotels	2.45	2.45	0.0%	0.00	National Bank of Fujairah	4.98	4.98	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£)
ELSWEDY ELECTRIC	8.71	6.5%	-11.2%	46.53	Export Devpt Bank of Egypt (EDBE)	12.32	-1.8%	-13.9%	1.91
GB AUTO	3.62	6.2%	9.0%	36.00	Ibnsina Pharma	4.02	-0.7%	-21.0%	13.67
Telecom Egypt	11.47	3.8%	-3.9%	17.34	Commercial International Bank	57.39	-0.5%	-3.0%	102.73
Heliopolis Housing	4.90	3.6%	-19.7%	10.87	Fawry For Banking Technology And Electronic Payment	22.93	-0.4%	-12.3%	127.07
Oriental Weavers	7.26	3.3%	6.0%	19.43	Credit Agricole Egypt	23.00	-0.3%	-20.7%	11.75
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£)
Six of October Development & Investment (SODIC)	17.98	18.20	-1.2%	14.10	Cleopatra Hospital Company	4.24	4.17	1.7%	6.68
Egyptian Kuwaiti Holding	1.04	1.06	-2.1%	2.95	Commercial Intl. Bank (Egypt)	57.39	52.70	8.9%	102.73
Orascom Development Egypt	5.98	6.23	-4.0%	3.18	Credit Agricole Egypt	23.00	21.05	9.3%	11.75
Sidi Kerir Petrochemicals	11.18	11.67	-4.2%	8.55	Emaar Misr for Development	2.35	2.12	10.8%	7.13
Palm Hills Development Co	1.68	1.83	-8.5%	7.80	Ibnsina Pharma	4.02	3.62	11.0%	13.69

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Mahindra & Mahindra	797.05	5.8%	10.6%	6771.266	Bharti Airtel	536.80	-2.3%	5.3%	18564.73
Bajaj Auto	4065.00	5.2%	18.0%	5506.50	ITC	210.20	-1.1%	0.6%	6441.85
Titan Company	1541.00	5.0%	-1.7%	4674.78	Coal India	146.80	-0.9%	8.4%	1521.61
Bajaj Finance	5676.20	4.5%	7.2%	17751.42	Dr Reddys Lab	5218.00	-0.6%	0.2%	4776.42
Adani Ports And Sez.	780.00	3.4%	61.2%	7585.36	Divi's Laboratories Limited	4029.80	-0.3%	4.9%	1632.72
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Indian Oil	105.45	106.60	-1.1%	3735.58	Nestle India Limited	17225.65	15100.00	14.1%	950.27
UPL	771.20	785.00	-1.8%	7912.56	Britannia Inds.	3528.75	3080.00	14.6%	1665.70
Asian Paints	2818.95	2873.45	-1.9%	3739.17	HUL	2380.50	1955.20	21.8%	2747.37
Bajaj Finserv	11350.00	11589.00	-2.1%	4626.22	ITC	210.20	163.15	28.8%	6441.85
Power Grid Corp Of India	233.90	239.85	-2.5%	7041.31	Coal India	146.80	109.55	34.0%	1521.61

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	173.25	1.0%	12.3%	39.36	Nairobi Securities Exchange Plc	8.30	-6.3%	1.7%	0.16
Stanbic Holdings	81.75	0.6%	-3.8%	0.38	Centum Investment Company Plc	15.05	-2.3%	-6.2%	1.18
Equity Group Holdings Plc	40.95	0.1%	12.0%	46.16	Safaricom Plc	38.35	-1.7%	12.0%	299.59
KCB Group Plc	41.05	0.1%	7.7%	59.09	Nation Media Group	15.75	-1.3%	1.9%	0.05
					The Cooperative Bank of Kenya Ltd	12.30	-1.2%	-1.6%	3.00
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)
East African Breweries Limited	173.25	179.00	-3.2%	39.36	Standard Chartered Bank Kenya Ltd	131.00	130.00	0.8%	2.69
Equity Group Holdings Plc	40.95	42.35	-3.3%	46.16	Kengen Limited	4.08	3.95	3.3%	1.38
KCB Group Plc	41.05	42.80	-4.1%	59.09	Absa Bank Kenya	8.84	8.50	4.0%	1.88
British American Tobacco Kenya Ltd	470.00	500.00	-6.0%	7.47	Centum Investment Company Plc	15.05	14.40	4.5%	1.18
Safaricom Plc	38.35	41.25	-7.0%	299.59	WPP Scangroup Plc	5.50	5.04	9.1%	0.11

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Kingdom Holding Co.	9.20	9.3%	15.7%	68.94	Saudi Industrial Investment Group	37.05	-2.8%	35.2%	33.40
Saudi Advanced Industries Co.	39.90	6.3%	111.1%	500.39	Banque Saudi Fransi	35.80	-2.6%	13.3%	21.74
Northern Region Cement Co.	18.00	5.9%	48.0%	221.56	AL Maather REIT Fund	9.38	-2.3%	5.4%	18.04
Al Abdullatif Industrial Investment Co.	21.74	5.2%	42.1%	126.77	National Medical Care Co.	61.70	-2.2%	15.5%	35.68
Sahara International Petrochemical Co.	28.85	3.8%	66.6%	134.94	Gulf Union Alahlia	18.90	-2.2%	-7.4%	19.55
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)
Zamil Industrial Investment Co.	27.45	27.45	0.0%	21.10	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Electronics Co.	115.80	115.80	0.0%	21.15	Theeb Rent a Car	53.00	52.00	1.9%	16.87
Taleem REIT Fund	15.94	15.94	0.0%	8.59	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Taiba Investments Co.	34.90	34.90	0.0%	16.53	BinDawood Holding Co.	112.00	105.60	6.1%	13.55
Seera Group Holding	22.14	22.14	0.0%	159.71	Savola Group	40.55	36.60	10.8%	57.27

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Remgro Limited	11350.00	4.6%	18.0%	31070.80	Redefine Properties	406.00	-2.6%	21.9%	9342.35
Bid Corporation	29392.00	3.9%	11.7%	33511.64	Vodacom Group	12468.00	-1.8%	0.2%	26741.70
Woolworths Hdg.	5385.00	3.6%	36.2%	24510.59	Spar Group	18834.00	-1.7%	-0.6%	14261.07
Shoprite Limited	15368.00	3.3%	9.8%	35234.18	Naspers Ltd	301426.00	-1.7%	-0.2%	223237.60
Bidvest Group	18006.00	3.3%	14.7%	30304.67	RMB Holdings Ltd	127.00	-1.6%	52.7%	604.40
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)
Capitec Bank	160961.00	161400.00	-0.3%	33439.97	Prosus (JSE)	143876.00	139405.00	3.2%	87076.06
Woolworths Hdg.	5385.00	5423.00	-0.7%	24510.59	Vodacom Group	12468.00	12009.00	3.8%	26741.70
Aspen PhmcR.Hdg.	16705.00	16846.00	-0.8%	31346.58	Naspers Ltd	301426.00	278829.00	8.1%	223237.60
Mondi (JSE)	38858.00	39989.00	-2.8%	12781.68	Brit.Amer.Tobacco (JSE)	55816.00	50757.00	10.0%	32724.20
Bidvest Group	18006.00	18600.00	-3.2%	30304.67	Reinet Investments (JSE) SCA	27452.00	24721.00	11.0%	10936.41

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Sai Gon Thuong Tin Commercial	27300.00	5.2%	61.5%	1,182.242.12	Hoang Huy Investment Financial Services	22200.00	-3.1%	15.3%	77252.06
No Va Land Invest	141700.00	3.0%	117.1%	182394.88	Vingroup JSC	121000.00	-2.4%	11.8%	302.555.64
Hoa Phat Group JSC	63400.00	2.4%	53.0%	2,477.570.22	Vincom Retail	30000.00	-2.3%	-4.5%	190599.71
Vietnam Prosperity	67200.00	2.1%	106.8%	2,012.850.16	Bank for Inv. and Devp	40900.00	-2.2%	-14.6%	160565.77
Thanh Thanh Cong Tay Ninh	19900.00	1.5%	-5.0%	37522.42	Vinhomes	98900.00	-1.9%	10.5%	346319.11
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)
Vietnam Prosperity	67200.00	67400.00	-0.3%	2059391.04	Vinamilk	87000.00	84269.23	3.2%	258398.70
Sai Gon Thuong Tin Commercial	27300.00	27400.00	-0.4%	1221543.96	Bank for Inv. and Devp	40900.00	34958.13	17.0%	159636.79
FPT Corp	87000.00	87400.00	-0.5%	185614.50	Vietjet Aviation	113000.00	94300.00	19.8%	44171.70
Hoa Phat Group JSC	63400.00	63700.00	-0.5%	2481875.42	Vincom Retail	30000.00	24600.00	22.0%	187107.00
Military Commercial Bank	33300.00	33800.00	-1.5%	767158.74	Vietcombank	94600.00	74492.52	27.0%	198981.64

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