

Daily Market Report

20 May 2021

JSE

JSE All-Share Index dropped by 2.06% to close at 65,855.81 on Wednesday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 150.86 points, down by 0.42% on Wednesday, with CIE Côte d'Ivoire and Oragroup Togo being the top losers.

NSE

NSE All-Share decreased by 1.48% to close at 38,445.09 points on Wednesday, as the Banking, Insurance, and Consumer goods sectors recorded losses.

EGX

EGX 30 Index was up by 0.23% and closed at 10,806.23 points on Wednesday, amid Arab purchases.

ESG

Casablanca ESG 10 Index closed at 928.36 points on Wednesday, as it increased by 0.16%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.06%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.42%
NSE Nigerian Stock Exchange	▼ 1.48%
EGX Egyptian Stock Exchange	▲ 0.23%
ESG Casablanca Stock Exchange	▲ 0.16%

African Markets

Nigeria: NSE 30 Index increased by 0.39% and closed at 1,562.01 points on Wednesday. Seplat and Sterling were the top gainers.

Egypt: EGX 30 Index was up by 0.23% and closed at 10,806.23 points on Wednesday, amid Arab purchases.

Kenya: NSE 20 Index decreased by 0.23% and closed at 1,838.25 points on Wednesday. Nairobi Securities Exchange and The Cooperative Bank of Kenya were the top losers.

South Africa: JSE Top 40 Index dropped 2.31% to close at 59,776.91 on Wednesday, as all the sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	18.12%
Exchange Rate	N/A
INTERBANK RATES	
OBB	14.50 ▲
Overnight	15.00 ▲

Other Emerging Markets

Abu Dhabi: ADX General declined by 0.15% to close at 6,518.61 points on Wednesday, as International Holdings Company and Etisalat recorded losses. MSCI UAE Index increased by 0.08% to close at 375.46 points.

Vietnam: VN-30 Index rose 1.68% to close at 1,401.71 points on Wednesday, as the blue chip companies recorded gains. MSCI Vietnam increased by 1.03% to close at 998.60 points.

Saudi Arabia: Tadawul All Share Index fell by 0.49% to close at 10,372.54 points on Wednesday, as losses in IT, Banking, Retail and Telecom sectors pushed the shares lower. MSCI Tadawul 30 Index decreased by 0.57% to close at 1,399.57 points.

India: Nifty 50 declined 0.52% to close at 15,030.15 points on Wednesday, as losses in the Banking, Auto, Metals and Financial Services sectors pushed the shares lower. MSCI India Index fell 0.26% to close at 1,738.63.

News

Nigeria:

Govs Okay Full Deregulation of Petrol, N385 Pump Price
CSCS Shareholders Approve N5.8bn Dividend, Laud Performance
Abbey Mortgage Bank Unfolds Business Growth Plan

Kenya:

Bamburi Cement Investors to Receive KSh1.089 Billion in Dividends
MPs approve tax-free deal for Japanese firms, expats
Petroleum, mining expat contractors face steeper taxes

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Abu Dhabi:

UAE to allow investors full ownership of companies from June 1
Abu Dhabi's Reem Investments to raise \$1.6bn debt, fresh equity
Dafza, SCA sign agreement to support crypto assets trading

Saudi Arabia:

Saudi's HVAC market to Surpass \$4,821.8mln revenue by 2030
Saudi Arabian pharma drugs market worth \$10bn, set to grow
Saudi Arabia's top luxury project Amaala could raise up to \$2.7bn next year

Egypt:

CBE amends initiative to finance payment of wages for workers in tourism sector
CBE raises maximum of financing in initiative to replace, renovate hotels
EFG Hermes reports 30% YoY surge to EGP 1.3 bn; stellar performance in 1Q21

South Africa:

Inflation spikes to 4.4% in April
Tourism sector to receive R3bn rejuvenation to help it recover from Covid
SA's Industrial Policy gets a shoeshine in financial inclusion

India:

Relief for Indian firms as Biden admin removes rule restricting H-1B applications
Adani Green to buy SB Energy green portfolio at \$3.5 billion valuation
RBI makes prepaid cards, digital wallets interoperable

Vietnam:

Foreign enterprises place trust, raise investment in Dong Nai
VinaCapital fund plans to divest from KDH
India launches anti-dumping probe on solar panels from Vietnam

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,518.61	-0.1%	5.0%	7.3%	29.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,806.23	0.2%	0.4%	3.2%	-0.4%	EGP/USD	15.68	0.0%	-0.3%
India	15,030.15	-0.5%	2.4%	2.7%	7.5%	INR/USD	73.18	0.2%	0.1%
Kenya	1,838.25	-0.2%	-1.3%	-1.5%	-1.6%	KES/USD	107.85	0.3%	-1.2%
Nigeria	1,562.01	0.4%	-1.3%	-2.3%	-4.8%	NGN/USD	411.75	0.7%	4.3%
Saudi Arabia	10,372.54	-0.5%	0.5%	0.1%	19.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,776.91	-2.3%	-1.3%	-2.2%	9.9%	ZAR/USD	14.05	0.4%	-4.4%
Vietnam	1,401.71	1.7%	1.6%	6.8%	30.9%	VND/USD	23,046.00	0.0%	-0.2%

MSCI Emerging Markets

MSCI Frontier	619.47	0.1%	0.5%	1.7%	8.4%	Brent Crude (\$)	66.66	-3.0%	28.5%
MSCI Frontier 100	1,385.61	-0.1%	0.2%	2.4%	10.2%	Gold (\$)	1,883.59	0.8%	-0.7%
MSCI Emerging	1,327.54	-0.4%	1.5%	-1.5%	2.8%	Copper (\$)	9,980.00	-3.8%	28.8%
MSCI World (USD)	2,910.94	-0.6%	-0.9%	-0.9%	8.2%	Coffee (\$)	135.84	4.2%	14.0%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Seplat Petroleum	682.00	10.0%	69.5%	1081.14	Airtel Africa	837.00	-10.0%	-1.7%	108.82
Sterling	1.69	9.7%	-17.2%	7.66	Dangote Sugar	17.10	-3.9%	-2.8%	32.21
BUA Cement	74.40	2.5%	-3.8%	48.22	Ecobank	5.20	-3.7%	-13.3%	4.34
Transnational Corporation	0.88	2.3%	-2.2%	7.77	Custodian	5.85	-2.5%	0.0%	2.39
P Z Cussons	5.40	1.9%	1.9%	10.37	Zenith	23.00	-2.1%	-7.3%	222.85
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%	42.96	Transcorp Hotels	3.57	3.25	9.8%	0.39
Seplat Petroleum	682.00	682.00	0.0%	1081.14	Wema	0.57	0.50	14.0%	2.05
Okomu Oil	96.50	96.50	0.0%	29.31	Unilever	12.60	10.50	20.0%	2.91
Presco	78.90	79.75	-1.1%	9.28	11 Plc (Mobil)	219.00	173.40	26.3%	0.00
UACN	10.30	10.45	-1.4%	103.44	UBN	5.95	4.65	28.0%	13.17

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	2.69	15.0%	15.5%	3.69	Sharjah Insurance	1.44	-10.0%	-31.8%	0.01
Gulf Cement	0.87	8.8%	3.7%	0.11	Sharjah Cement	0.62	-9.9%	-18.9%	0.03
Emirates Driving Co.	15.76	8.7%	18.1%	4.97	Ras Al Khaimah Ceramics	1.96	-4.9%	30.7%	3.99
ZEE STORE PRJSC	9.42	4.7%	-10.3%	5.60	Arkan Building Materials	1.29	-2.3%	46.6%	17.25
RAK Co. for White Cement & Construction	0.85	3.8%	0.1%	0.02	Methaq Takaful Ins.	0.82	-2.3%	-5.5%	0.21
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	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£)
Citadel Capital - Common Shares	1.35	3.4%	-6.4%	28.90	Orascom Development	5.82	-2.7%	18.8%	3.19
MM Group For Industry And International Trade	9.56	3.1%	21.9%	49.09	GB AUTO	3.54	-2.2%	6.6%	9.41
Edita Food Industries S.A.E	8.00	3.1%	-10.1%	13.49	Heliopolis Housing	4.82	-1.6%	-21.0%	8.86
Fawry For Banking Tech And Electronic Payment	23.59	2.9%	-9.7%	137.90	Abou Kir Fertilizers	20.44	-1.5%	-1.2%	0.54
Credit Agricole Egypt	23.63	2.7%	-18.6%	3.72	Ezz Steel	11.05	-1.3%	3.0%	23.93
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)	17.80	18.20	-2.2%	1.59	Cleopatra Hospital Company	4.24	4.17	1.7%	10.50
Egyptian Kuwaiti Holding	1.04	1.06	-2.2%	0.33	Commercial International Bank	57.10	52.70	8.3%	153.44
Sidi Kerir Petrochemicals	11.17	11.67	-4.3%	3.07	Emaar Misr for Development	2.32	2.12	9.4%	3.93
Orascom Development Egypt	5.82	6.23	-6.6%	3.19	Ibnsina Pharma	4.01	3.62	10.8%	13.76
Palm Hills Development Company	1.67	1.83	-8.5%	7.79	Credit Agricole Egypt	23.63	21.05	12.3%	3.71

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Coal India	151.50	3.5%	11.8%	3587.502	Tata Motors	314.10	-5.5%	70.8%	37761.28
Cipla	902.55	2.1%	10.1%	6496.14	Bajaj Finserv	11195.00	-1.8%	25.7%	2564.60
Sun Pharm.Industries	703.95	1.9%	18.8%	5419.79	Mahindra & Mahindra	783.65	-1.8%	8.7%	3419.89
UPL	782.00	1.6%	67.7%	14036.83	HDFC	2461.15	-1.7%	-3.8%	5041.58
Nestle India Limited	17432.00	1.5%	-5.2%	1538.99	Jsw Steel	705.80	-1.6%	82.3%	4667.29
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	107.00	108.95	-1.8%	7927.79	Britannia Inds.	3537.00	3080.00	14.8%	2437.00
Asian Paints	2808.00	2873.45	-2.3%	3440.73	Nestle India Limited	17432.00	15100.00	15.4%	1538.99
Sun Pharm.Industries	703.95	721.85	-2.5%	5419.79	HUL	2360.00	1955.20	20.7%	3125.71
Power Grid Corp Of India	233.15	239.85	-2.8%	3714.49	ITC	207.85	163.15	27.4%	5090.71
UPL	782.00	805.30	-2.9%	14036.83	Bharti Airtel	527.95	394.00	34.0%	10214.94

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	16.20	2.9%	4.9%	2.39	Nairobi Securities Exchange Plc	8.06	-2.9%	-1.2%	0.17
Total Kenya Ltd	24.15	2.5%	0.6%	0.07	The Cooperative Bank of Kenya Ltd	11.95	-2.8%	-4.4%	26.38
WPP Scangroup Plc	5.60	1.8%	-6.7%	0.06	KCB Group Plc	40.25	-1.9%	5.6%	13.04
Absa Bank Kenya	8.92	0.9%	-7.7%	1.54	Kengen Limited	4.01	-1.7%	-14.9%	0.91
East African Breweries Limited	174.00	0.4%	12.8%	7.36	Stanbic Holdings	81.00	-0.9%	-4.7%	0.11
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	174.00	179.00	-2.8%	7.36	Standard Chartered Bank Kenya Ltd	131.25	130.00	1.0%	1.29
Equity Group Holdings Plc	41.05	42.35	-3.1%	29.21	Kengen Limited	4.01	3.95	1.5%	0.91
KCB Group Plc	40.25	42.80	-6.0%	13.04	Centum Investment Company Plc	14.95	14.40	3.8%	1.30
British American Tobacco Kenya Ltd	470.00	500.00	-6.0%	0.14	Absa Bank Kenya	8.92	8.50	4.9%	1.54
Safaricom Plc	38.05	41.25	-7.8%	796.18	Diamond Trust Bank Limited	64.00	58.50	9.4%	0.10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Abdullatif Industrial Investment Co.	23.90	9.9%	56.2%	198.84	Sahara International Petrochemical Co.	28.15	-2.4%	62.5%	62.26
Alkhorayef Water and Power Technologies Co.	125.80	5.9%	34.4%	146.67	Saudi Advanced Industries Co.	39.15	-1.9%	107.1%	132.71
Saudi Public Transport Co.	25.50	4.2%	42.1%	329.03	Musharaka REIT Fund	10.86	-1.8%	10.5%	3.39
Amana Cooperative Insurance Co.	35.00	3.7%	-5.8%	46.60	Jadwa REIT Saudi Fund	15.50	-1.8%	10.7%	5.14
City Cement Co.	30.55	2.7%	19.3%	18.54	Al Moammar Info Systems Co.	112.00	-1.8%	16.4%	14.34
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.	27.80	27.80	0.0%	10.68	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Taleem REIT Fund	16.04	16.04	0.0%	4.34	Theeb Rent a Car	52.80	52.00	1.5%	19.39
Taiba Investments Co.	34.40	34.40	0.0%	16.55	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Seera Group Holding	22.02	22.02	0.0%	75.87	BinDawood Holding Co.	112.00	105.60	6.1%	18.06
Saudi Research and Marketing	100.20	100.20	0.0%	19.57	Savola Group	40.35	36.60	10.2%	26.90

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglogold Ashanti	37110.00	3.9%	8.3%	152596.39	Impala Platinum	23832.00	-8.7%	18.0%	141868.73
Bidvest Group	18519.00	2.8%	17.9%	31611.06	Anglo American	62087.00	-5.7%	28.0%	116077.73
Multichoice Group	12653.00	2.7%	-5.6%	17067.61	BHP Group (JSE)	42379.00	-4.9%	8.9%	108110.27
Redefine Properties	416.00	2.5%	24.9%	3971.13	Northam Platinum	23258.00	-4.1%	11.0%	26155.99
Vodacom Group	12730.00	2.1%	2.3%	26606.51	Sibanye Stillwater	6437.00	-3.9%	7.3%	84544.21
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	163057.00	163615.00	-0.3%	65006.10	Prosus (JSE)	142183.00	139405.00	2.0%	54334.10
Bidvest Group	18519.00	18625.00	-0.6%	31611.06	Vodacom Group	12730.00	12009.00	6.0%	26606.51
Woolworths Hdg.	5342.00	5423.00	-1.5%	17624.02	Naspers Ltd	298375.00	278829.00	7.0%	298039.63
Mr Price Group	20246.00	20706.00	-2.2%	23449.61	Brit.Amer.Tobacco	54996.00	50757.00	8.4%	25844.71
Aspen Phmcr.Hdg.	16345.00	16846.00	-3.0%	11543.33	Reinet Investments	27030.00	24721.00	9.3%	6991.23

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	28500.00	4.4%	68.6%	1.306.022.66	Vietjet Aviation	110000.00	-2.7%	-12.0%	40171.50
FPT Corp	90800.00	4.4%	53.6%	254.764.72	PetroVietnam Power Corp	11700.00	-2.5%	-94.0%	200953.06
Hoa Phat Group JSC	66100.00	4.3%	59.5%	1855853.68	Vincom Retail	29350.00	-2.2%	-6.5%	353.122.45
Techcombank	50100.00	3.6%	59.0%	858840.56	Hoang Huy Investment Financial Services	21850.00	-1.6%	13.5%	96734.00
Military Commercial Bank	34500.00	3.6%	51.4%	997912.00	BaoViet Holdings	53200.00	-1.5%	-19.4%	31887.25
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	Khang Dien House Trading & Investment	35800.00	35800.00	0.0%	197.839.89
Sai Gon Thuong Tin Commercial	27300.00	27400.00	-0.4%	1221543.96	Military Commercial Bank	34500.00	34500.00	0.0%	997912.00
FPT Corp	87000.00	87400.00	-0.5%	185614.50	Vietnam National Petroleum Group	54200.00	54200.00	0.0%	153.452.60
Hoa Phat Group JSC	63400.00	63700.00	-0.5%	2481875.42	PetroVietnam Power Corp	11700.00	11700.00	0.0%	200953.06
Military Commercial Bank	33300.00	33800.00	-1.5%	767158.74	Saigon Securities	36000.00	36000.00	0.0%	582.774.81

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