

Daily Market Report

21 May 2021

JSE

JSE All-Share Index increased by 0.41% to close at 66,124.44 on Thursday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 152.31 points, up by 0.96% on Thursday, with Citab Côte d'Ivoire and Nestle Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased by 0.30% to close at 38,328.13 points on Thursday, as the Industrial and Banking sectors recorded losses.

EGX

EGX 30 Index declined by 0.69% and closed at 10,731.96 points on Thursday, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 912.19 points on Thursday, as it fell by 1.74%.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.41%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.96%
NSE Nigerian Stock Exchange	▼ 0.30%
EGX Egyptian Stock Exchange	▼ 0.69%
ESG Casablanca Stock Exchange	▼ 1.74%

African Markets

Nigeria: NSE 30 Index decreased by 0.31% and closed at 1,557.11 points on Thursday. Sterling and Unilever were the top losers.

Egypt: EGX 30 Index declined by 0.69% and closed at 10,731.96 points on Thursday, amid foreign selling.

Kenya: NSE 20 Index increased by 0.76% and closed at 1,852.28 points on Thursday. Nairobi Securities Exchange and Safaricom were the top gainers.

South Africa: JSE Top 40 Index increased by 0.49% to close at 60,068.05 on Thursday, as the Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	18.12%
Exchange Rate	N/A
INTERBANK RATES	
OBB	15.00 ▲
Overnight	15.25 ▲

Other Emerging Markets

Abu Dhabi: ADX General inched down 0.01% to close at 6,517.85 points on Thursday, as First Abu Dhabi Bank and Al Khaleej Investment recorded losses. MSCI UAE Index increased by 0.72% to close at 378.18 points.

Vietnam: VN-30 Index rose 1.66% to close at 1,424.92 points on Thursday, as the blue chip companies recorded gains. MSCI Vietnam increased by 1.67% to close at 1,015.24 points.

Saudi Arabia: Tadawul All Share Index fell by 0.32% to close at 10,339.85 points on Thursday, as losses in IT, Banking, Utilities and Material sectors pushed the shares lower. MSCI Tadawul 30 Index decreased by 0.53% to close at 1,392.16 points.

India: Nifty 50 declined 0.83% to close at 14,906.05 points on Thursday, as losses in the Banking, Consumer Goods, Metals and Financial Services sectors pushed the shares lower. MSCI India Index fell 0.67% to close at 1,726.92.

News

Nigeria:

Firms borrowed N258.59bn from bond market amid COVID-19 – SEC
Seplat to pay 10 cents dividend, shareholders approve name change
Govt revenue from drink makers rose to N23bn – nbs

Kenya:

IFC to loan KSh5.4 Billion to I&M Bank Kenya
Off-grid power firms set for 50pc investment tax relief
Jobs, paycuts slash payroll collection by Sh6.4 billion

Page 1 of 4

Abu Dhabi:

Allowing 100% foreign ownership in UAE firms will boost property market
Etihad Airways and Saudia announce new reciprocal loyalty agreement
Khalifa Fund launches Abu Dhabi SME Hub

Saudi Arabia:

Saudi April inflation rate edges up to 5.3% on food, transport prices
Saudi's Devpt Works Food Co to acquire 100% of shares of a seafood chain
Saudi Arabia holds spot as China's top crude supplier in April

Egypt:

EFG Hermes sign agreements for acquiring 76% of Arab Investment Bank
South Korea selects Egypt as key ODA partner in MENA region through 2025
Egypt, Germany ink €57.7 mln development financing agreement

South Africa:

Repo rate stays at 3.5%
Retail data for the month contracted by 2.5%, but some sectors shine
Investec Property Fund de-gears, pays out 95% in dividends

India:

Union Bank raises Rs 1,447cr via QIP route
HPCL net profit vaults to Rs 3,017 crore in Q4
Torrent Power clears Rs 2,000 crore NCD via private placement
Vietnam:
DIC to mobilise \$87 million by issuing bonds
Hà Nội strengthens promotion for farm produce, establishes a resilient agriculture Investment in export EPZs, IZs in HCM City up nearly 23 percent

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,517.85	-0.01%	5.0%	7.3%	29.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,731.96	-0.7%	-0.3%	2.5%	-1.0%	EGP/USD	15.68	0.0%	-0.3%
India	14,906.05	-0.8%	1.6%	1.9%	6.6%	INR/USD	73.11	-0.1%	0.1%
Kenya	1,852.28	0.8%	-0.6%	-0.8%	-0.9%	KES/USD	108.25	0.4%	-0.9%
Nigeria	1,557.11	-0.3%	-1.6%	-2.6%	-5.1%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	10,339.85	-0.3%	0.2%	-0.2%	19.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,068.05	0.5%	-0.8%	-1.7%	10.5%	ZAR/USD	14.00	-0.4%	-4.7%
Vietnam	1,424.92	1.7%	3.3%	8.6%	33.1%	VND/USD	23,046.50	0.0%	-0.2%

MSCI Emerging Markets

MSCI Frontier	622.32	0.5%	1.0%	2.1%	8.9%	Brent Crude (\$)	65.11	-2.3%	25.5%
MSCI Frontier 100	1,387.87	0.2%	0.3%	2.5%	10.3%	Gold (\$)	1,879.55	-0.2%	-1.0%
MSCI Emerging	1,329.31	0.1%	1.7%	-1.4%	2.9%	Copper (\$)	10,031.50	0.5%	29.5%
MSCI World (USD)	2,942.21	1.1%	0.1%	0.1%	9.4%	Coffee (\$)	135.11	-0.5%	13.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	56.00	2.2%	0.0%	34.65	Sterling	1.56	-7.7%	-23.5%	4.76
Ecobank	5.30	1.9%	-11.7%	3.18	Unilever	12.20	-3.2%	-12.2%	8.01
Wema	0.58	1.8%	-15.9%	0.85	Transnational Corporation	0.86	-2.3%	-4.4%	2.72
Fidelity	2.33	1.7%	-7.5%	12.74	Dangote Cement	210.00	-1.9%	-14.3%	40.62
UACN	10.45	1.5%	44.1%	18.14	UBA	7.25	-1.4%	-16.2%	20.14
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	10.45	10.45	0.0%	18.14	Transcorp Hotels	3.57	3.25	9.8%	0.14
Total	145.00	145.00	0.0%	1.64	Wema	0.58	0.50	16.0%	0.85
Seplat Petroleum	682.00	682.00	0.0%	54.72	Unilever	12.20	10.50	16.2%	8.01
Okomu Oil	96.50	96.50	0.0%	9.97	11 Plc (Mobil)	219.00	173.40	26.3%	0.00
Presco	78.90	79.75	-1.1%	1.88	UBN	5.95	4.65	28.0%	4.76

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sharjah Cement	0.70	13.5%	-8.0%	0.04	AL KHALEEJ INVESTMENT	1.10	-8.3%	0.0%	0.14
Abu Dhabi National for Building Materials	0.25	12.9%	-5.4%	0.03	Sharjah Group Co.	0.80	-5.9%	-5.9%	0.04
Abu Dhabi Ship Building	2.96	10.0%	27.0%	27.56	ZEE STORE PRJSC	9.04	-4.0%	-13.9%	3.16
Waha Capital	1.34	3.1%	11.7%	9.77	Gulf Cement	0.85	-2.3%	1.3%	0.00
Abu Dhabi Commercial Bank	6.55	2.8%	5.6%	78.07	Sudatel Telecom	0.38	-1.8%	-7.5%	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%	0.00	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 EE)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn EE)
EFG-Hermes Holding Co	14.72	2.1%	0.6%	45.61	Elswedy Electric	8.38	-4.2%	-14.6%	38.13
Credit Agricole Egypt	23.94	1.3%	-17.5%	5.32	MM Group For Ind. And Intl. Trade	9.26	-3.1%	18.1%	9.32
Emaar Misr for Development	2.35	1.3%	-0.8%	15.53	Fawry For Banking Tech And Electronic Payment	22.93	-2.8%	-12.3%	101.58
Edita Food Industries S.A.E	8.07	0.9%	-9.3%	0.22	CI Capital Holding For Financial Investments	3.22	-2.4%	-19.3%	2.09
Eastern Company	12.21	0.5%	-6.4%	2.08	Ibnsina Pharma	3.93	-2.0%	-22.8%	4.65
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn EE)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn EE)
Egyptian Kuwaiti Holding	1.04	1.06	-2.6%	0.35	Cleopatra Hospital	4.21	4.17	1.0%	1.69
Six of October Development & Investment (SODIC)	17.63	18.20	-3.1%	1.94	Commercial International Bank	56.98	52.70	8.1%	179.83
Sidi Kerir Petrochemicals	11.02	11.67	-5.6%	1.60	Ibnsina Pharma	3.93	3.62	8.6%	4.65
Orascom Development Egypt	5.80	6.23	-6.9%	3.31	Emaar Misr for Development	2.35	2.12	10.8%	15.50
EFG-Hermes Holding Co	14.72	16.10	-8.6%	45.61	Heliopolis Housing	4.82	4.29	12.4%	3.49

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Cipla	925.50	2.4%	12.9%	11384.681	Tata Steel	1104.90	-5.1%	71.7%	31669.78
Mahindra & Mahindra	803.00	2.3%	11.4%	8088.16	Hindalco Industries	386.20	-4.2%	60.5%	11881.02
Bharat Petroleum	455.80	2.1%	19.6%	4244.72	Coal India	146.65	-3.4%	8.3%	3419.25
Indusind Bank	976.50	1.0%	9.1%	5705.83	Britannia Inds.	3428.90	-3.0%	-4.1%	3605.95
Titan Company	1535.50	0.9%	-2.0%	4695.07	ONGC	111.60	-2.9%	19.9%	2373.86
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Asian Paints	2791.05	2873.45	-2.9%	3407.87	Britannia Inds.	3428.90	3080.00	11.3%	3605.95
Bajaj Finserv	11250.05	11589.00	-2.9%	1996.46	Nestle India Limited	17325.00	15100.00	14.7%	851.58
Divi's Laboratories Limited	4041.80	4205.00	-3.9%	1542.34	HUL	2349.00	1955.20	20.1%	2010.92
Wipro	507.95	528.50	-3.9%	3209.58	ITC	207.10	163.35	26.8%	4335.18
Bajaj Finance	5595.00	5822.20	-3.9%	8328.57	Bharti Airtel	521.20	394.00	32.3%	7213.28

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	8.86	9.9%	8.6%	0.03	Kenya Reinsurance Corporation Ltd	2.34	-1.7%	0.9%	2.38
Safaricom Plc	38.90	2.2%	13.6%	126.57	Bamburi Cement Limited	36.40	-1.5%	-3.8%	0.13
Absa Bank Kenya	9.02	1.1%	-6.6%	4.36	Total Kenya Ltd	24.05	-0.4%	0.2%	0.04
Centum Investment Company Plc	15.10	1.0%	-5.9%	0.07	Diamond Trust Bank Limited	63.75	-0.4%	-15.0%	0.21
Nation Media Group	16.35	0.9%	5.8%	2.02	WPP Scangroup Plc	5.58	-0.4%	-7.0%	1.58
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	173.75	179.00	-2.9%	23.68	Standard Chartered Bank Kenya Ltd	131.50	130.00	1.2%	1.42
Equity Group Holdings Plc	41.05	42.35	-3.1%	50.03	Kengen Limited	4.02	3.95	1.8%	0.85
Nairobi Securities Exchange Plc	8.86	9.34	-5.1%	0.03	Centum Investment Company Plc	15.10	14.40	4.9%	0.07
KCB Group Plc	40.55	42.80	-5.3%	17.81	Absa Bank Kenya	9.02	8.50	6.1%	4.36
Safaricom Plc	38.90	41.25	-5.7%	126.57	Diamond Trust Bank Limited	63.75	58.50	9.0%	0.21

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Astra Industrial Group	36.30	10.0%	41.2%	59.25	Middle East Healthcare Co.	38.20	-3.4%	9.0%	151.73
Zamil Industrial Investment Co.	30.55	9.9%	47.2%	147.77	Sahara International Petrochemical Co.	27.30	-3.0%	57.6%	100.81
Al Abdullatif Industrial Investment Co.	26.25	9.8%	71.6%	184.08	National Petrochemical Co.	50.60	-2.5%	52.2%	14.57
Al-Babtain Power and Telecommunication Co.	44.00	6.9%	39.0%	104.24	National Gypsum Co.	36.65	-2.3%	31.1%	24.98
Al Hassan Ghazi Ibrahim Shaker Co.	22.30	6.6%	38.3%	329.33	Basic Chemical Industries Co.	39.90	-2.2%	19.6%	32.76
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.	30.55	30.55	0.0%	147.77	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Taleem REIT Fund	15.90	15.90	0.0%	2.85	Theeb Rent a Car	53.00	52.00	1.9%	15.91
Takween Advanced Industries Co.	18.10	18.10	0.0%	200.43	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Taiba Investments Co.	33.90	33.90	0.0%	26.67	BinDawood Holding Co.	112.80	105.60	6.8%	13.96
Seera Group Holding	21.90	21.90	0.0%	70.79	Savola Group	40.20	36.60	9.8%	29.32

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Investec Plc	5513.00	3.2%	50.5%	8221.32	Anglogold Ashanti	36244.00	-2.3%	5.8%	49272.74
Investec Ltd (JSE)	5750.00	3.1%	52.7%	5710.45	Multichoice Group	12375.00	-2.2%	-7.6%	13548.86
Naspers Ltd	304152.00	1.9%	0.7%	431630.92	Mr Price Group	19875.00	-1.8%	16.5%	18275.32
Prosus (JSE)	144819.00	1.9%	-9.8%	115714.44	Bidvest Group	18202.00	-1.7%	15.9%	11257.75
Firststrand Ltd	5285.00	1.8%	3.5%	59195.30	Sasol Limited	22064.00	-1.5%	64.7%	38630.16
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	162981.00	163650.00	-0.4%	65602.79	Prosus (JSE)	144819.00	139405.00	3.9%	115714.44
Bidvest Group	18202.00	18645.00	-2.4%	11257.75	Vodacom Group	12709.00	12009.00	5.8%	14869.53
Investec Ltd (JSE)	5750.00	5913.00	-2.8%	5710.45	Brit.Amer.Tobacco	54800.00	50757.00	8.0%	23156.78
Aspen Phmcdr.Hdg.	16369.00	16846.00	-2.8%	14712.08	Naspers Ltd	304152.00	278829.00	9.1%	431630.92
Remgro Limited	11534.00	11878.00	-2.9%	12428.77	Reinet Investments	27153.00	24721.00	9.8%	5628.30

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Securities Inc	38500.00	6.9%	16.3%	1061924.68	PetroVietnam Power Corp	11450.00	-2.1%	-94.1%	172094.85
Phu Nhuan Jewelry	99300.00	6.2%	22.6%	99523.62	Thanh Thanh Cong Tay Ninh	19300.00	-1.8%	-7.9%	41052.89
Refrigeration Electrical Engrn	58400.00	6.2%	19.3%	82.753.34	Vietnam Prosperity	66800.00	-1.0%	105.5%	2,274.611.32
Mobile World Inv. Corp	150000.00	5.9%	26.2%	203.258.51	Petrovietnam Gas	80800.00	-1.0%	-6.7%	57.750.53
Vietcombank	99000.00	5.2%	1.1%	182.553.45	BaoViet Holdings	52800.00	-0.8%	-20.0%	53767.71
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)
Mobile World Inv. Corp	150000.00	150000.00	0.0%	211470.00	Vinamilk	88000.00	84269.23	4.4%	246444.00
FPT Corp	95500.00	95500.00	0.0%	336532.45	Vietjet Aviation	111000.00	94300.00	17.7%	52802.70
Viet Nam JSC Bank For Industry And Trade	48900.00	48900.00	0.0%	687362.85	Vincom Retail	29500.00	24800.00	19.0%	222017.00
Hoa Phat Group JSC	66600.00	66700.00	-0.1%	1435369.86	Bank for Inv. and Devp	41850.00	34958.13	19.7%	146265.75
Phu Nhuan Jewelry	99300.00	99500.00	-0.2%	101752.71	Hoang Huy Investment Financial Services	21950.00	17314.95	26.8%	147727.89

Email: research@fsdhgroup.com • www.fsdhgroup.com

DISCLAIMER

This publication is produced by FSDH Capital LTD solely for the information of users who are expected to make their own investment decisions without undue reliance on any information or opinions contained herein. The opinions contained in the report should not be interpreted as an offer to sell, or a solicitation of any offer to buy any investment. FSDH Capital LTD may invest substantially in securities of companies using information contained herein and may also perform or seek to perform investment services for companies mentioned herein. Whilst every care has been taken in preparing this document, no responsibility or liability is accepted by any member of the FSDH Capital LTD for actions taken as a result of information provided in this publication.