

Daily Market Report

29 June 2021

JSE

JSE All-Share Index decreased by 0.61% to close at 65,809.38 points on Monday, as the Financial and Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 160.53 points, down by 0.65% on Monday with Air Liquide Côte d'Ivoire and Bollore Transport & Logistics being the top losers.

NSE

NSE All-Share declined by 0.19% to close at 37,585.25 points on Monday, as the Oil & Gas and Banking sectors recorded losses.

EGX

EGX 30 Index declined by 0.30% and closed at 10,273.92 points on Monday, as the market lost LE 2.07 billion of market cap, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index closed at 935.20 points on Monday, as it rose 0.57%.

African Markets

Nigeria: NSE 30 Index slipped by 0.03% and closed at 1,577.75 points on Monday. Sterling and Presco were the top losers.

Egypt: EGX 30 Index declined by 0.30% and closed at 10,273.92 points on Monday, as the market lost LE 2.07 billion of market cap, amid Egyptian and foreign selling.

Kenya: NSE 20 Index advanced by 1.03% and closed at 1,918.66 points on Monday. Nation Media Group and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.53% to close at 59,820.66 points on Monday, as the Financial and Resources sector recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.61%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.65%

NSE Nigerian Stock Exchange ▼ 0.19%

EGX Egyptian Stock Exchange ▼ 0.30%

ESG Casablanca Stock Exchange ▲ 0.57%

Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.16
INTERBANK RATES	
OBB	18.50 ▼
Overnight	19.25 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased by 0.63% to close at 6,749.16 points on Monday, as First Abu Dhabi Bank and International Holdings Company recorded gains. MSCI UAE Index marginally increased by 0.04% to close at 385.32 points.

Vietnam: VN-30 Index climbed 1.41% to close at 1,521.41 points on Monday, as the blue chip companies recorded gains. MSCI Vietnam increased by 1.23% to close at 1,063.98 points.

Saudi Arabia: Tadawul All Share Index was marginally down by 0.09% to close at 10,957.07 points on Monday, as losses in the Media & Publishing, Real Estate Development and Cement sectors pushed the shares lower. MSCI Tadawul 30 Index decreased by 0.18% to close at 1,461.49 points.

India: Nifty 50 decreased by 0.29% to close at 15,814.70 points on Monday, as losses in the Capital Goods, Technology and IT sectors pushed the shares lower. MSCI India Index declined by 0.21% to close at 1,831.21.

News

Nigeria:

Petrol Subsidy Bites Harder, NNPC Proposes N114.3bn Deduction in June Diesel price jumps to N280, LCCI says inflation'll rise
Nigerian Exchange Limited Lists Shares of GTHoldco

Kenya:

Kenya's Foreign Currency Reserves Climb to 7 Month High After IMF Loan
Bond issuance threshold to be set at \$50 billion
Safaricom to retain dividends despite Addis entry

Abu Dhabi:

UAE maps out plan to increase non-oil exports by 50%
Abu Dhabi approves EDE Covid-19 scanners and rolls out tech across emirate
Emaar Prop. plans to issue benchmark sukuk as real estate market improves

Saudi Arabia:

Saudi Tanmiah Food launches book building for 30% IPO
Saudi Aramco bets big on blue hydrogen investment
UAE's Mumzworld acquired by Saudi's Tamer Group

Egypt:

Egypt's parliament gives final approval to sovereign sukuk law
Egypt EGX's listing committee approves listing capital raise of Fawry
Egypt's NWC sets minimum wage at LE 2,400 for private sector

South Africa:

SA consumer confidence slips in the second quarter
National Aviation closes deal with Bidvest to acquire BidAir services
Ascendis to sell 49% stake in Farnalider

India:

Centre announces Rs 1.1 lakh crore loan guarantee scheme for affected sectors
Centre raises guarantee on business loans to Rs 4.5 lakh crore
Government extends mobile phone PLI scheme by a year till 2025-26

Vietnam:

Import-export value via Lao Cai int'l border gate surges neatly 42 pct in H1
Vietnamese iron and steel exports to the EU soar
Đồng Nai reaches full-year FDI target by Q2

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,749.16	0.6%	2.6%	2.9%	33.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,273.92	-0.3%	-0.05%	-0.3%	-5.3%	EGP/USD	15.67	0.0%	-0.4%
India	15,814.70	-0.3%	-0.3%	1.5%	13.1%	INR/USD	74.19	0.0%	1.5%
Kenya	1,918.66	1.0%	1.0%	2.5%	2.7%	KES/USD	107.80	0.0%	-1.3%
Nigeria	1,577.75	-0.03%	0.0%	1.0%	-3.8%	NGN/USD	411.75	0.4%	4.3%
Saudi Arabia	10,957.07	-0.1%	0.3%	3.8%	26.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,820.66	-0.5%	-0.5%	-3.2%	10.0%	ZAR/USD	14.21	0.7%	-3.3%
Vietnam	1,521.41	1.4%	1.4%	3.2%	42.1%	VND/USD	23,025.00	0.0%	-0.2%

MSCI Emerging Markets

MSCI Frontier	643.97	0.5%	0.5%	2.1%	12.7%	Brent Crude (\$)	74.68	-2.0%	43.9%
MSCI Frontier 100	1,442.70	0.5%	0.5%	2.9%	14.7%	Gold (\$)	1,781.70	0.04%	-6.1%
MSCI Emerging	1,380.90	0.1%	0.1%	0.3%	6.9%	Copper (\$)	9,361.25	-0.3%	20.8%
MSCI World (USD)	3,025.22	0.0%	0.0%	1.7%	12.5%	Coffee (\$)	141.2	2.5%	18.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.10	3.3%	-6.9%	2.90	Wema	0.58	-3.3%	-15.9%	2.91
UBA	7.35	1.4%	-15.0%	94.24	Sterling	1.57	-3.1%	-23.0%	3.33
Lafarge Africa	21.25	1.2%	1.0%	10.50	Transnational Corporation	0.87	-2.2%	-3.3%	1.66
Access	8.50	1.2%	0.6%	36.36	Presco	74.50	-1.8%	5.0%	10.06
Axamansard	0.90	1.1%	-14.3%	3.51	FBNH	7.20	-0.7%	0.7%	130.42
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%	28.32	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	700.00	700.00	0.0%	2.13	UBN	5.35	4.65	15.1%	1.40
Okomu Oil	105.50	105.50	0.0%	0.19	Wema	0.58	0.50	16.0%	2.91
P Z Cussons	5.85	5.85	0.0%	1.04	Cadbury	7.80	6.30	23.8%	1.75
Nigerian Breweries	59.85	63.25	-5.4%	17.83	Cap	19.00	15.25	24.6%	1.15

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Alpha Dhabi Holding	16.90	12.7%	12.7%	129.01	National Corp for Tourism and Hotels	3.15	-10.0%	74.0%	0.01
Zee Store	10.10	9.0%	-3.8%	19.40	Abu Dhabi National for Building Materials	0.27	-9.8%	3.1%	0.01
Ras Al Khaimah Cement	1.70	8.3%	116.6%	23.21	Sharjah Cement	0.71	-6.6%	-6.6%	0.55
Gulf Pharmaceutical Ind.	1.58	7.5%	18.8%	0.45	National Bank of Ras Al Khaimah	3.86	-5.9%	-1.0%	0.03
International Holding	114.60	3.4%	172.9%	410.70	Palms Sports	11.80	-5.1%	-10.6%	6.58
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 Wathba National Ins.	0.00	0.00	0.0%	0.00
Al Khazna Insurance Company	1.00	1.00	0.0%	0.00	Foodco Holding	0.00	0.00	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	0.0%	0.00	Al Buhaira Ntl Ins.	1.56	1.56	0.0%	3.59
Sharjah Islamic Bank	1.48	1.48	0.0%	3.06	Insurance House	0.79	0.79	0.0%	0.20
National Bank of Fujairah	4.98	4.98	0.0%	0.00	Al Ain Ahlia Ins.	31.20	31.20	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£)
GB AUTO	3.60	3.5%	8.4%	14.79	Ezz Steel	12.73	-6.0%	18.6%	87.81
Credit Agricole Egypt	23.76	3.1%	-18.1%	32.83	Orascom Investment Holding	0.21	-5.4%	-62.1%	28.10
Abou Kir Fertilizers	19.83	2.5%	-4.1%	9.22	Orascom Financial Holding	0.30	-3.2%	-37.0%	9.41
ELSWEDY ELECTRIC	8.63	2.3%	-12.0%	56.93	Palm Hills Development Company	1.79	-2.6%	31.5%	6.56
Medinet Nasr Housing	3.42	1.8%	-10.5%	5.28	Citadel Capital - Common Shares	1.23	-2.4%	-14.8%	9.49
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£)
Oriental Weavers	8.58	8.88	-3.4%	8.01	Commercial International Bank CI Capital Holding	51.75	48.70	6.3%	30.17
Palm Hills Dev. Company	1.79	1.87	-4.1%	6.57	For Financial Investments	3.24	2.97	9.1%	3.13
Six of October Development & Investment (SODIC)	17.29	18.20	-5.0%	1.40	Emaar Misr for Development	2.34	2.12	10.4%	7.42
Egyptian Kuwaiti Holding	1.00	1.06	-6.0%	0.60	Heliopolis Housing	4.74	4.29	10.5%	5.80
Sidi Kerir Petrochemicals	11.81	12.70	-7.0%	13.23	Egyptian Financial Group-Hermes Holdina Company	13.36	11.90	12.3%	12.91

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Dr Reddys Lab	5404.80	1.8%	3.8%	3194.855	HDFC Life Insurance Company Ltd	696.00	-4.1%	2.9%	5222.88
Hindalco Industries	382.45	1.7%	59.0%	5525.30	Titan Company	1730.75	-1.3%	10.4%	2322.19
Divi's Laboratories Limited	4322.15	1.7%	12.5%	2052.42	Shree Cement limited	28399.95	-1.2%	18.3%	616.26
Tata Steel	1185.00	1.7%	84.1%	13743.22	Tata Consultancy Svs.	3342.00	-1.2%	16.7%	4534.25
Tech Mahindra	1105.05	1.4%	13.5%	2352.54	Coal India	147.10	-1.1%	8.6%	1214.16
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tech Mahindra	1105.05	1108.00	-0.3%	2352.54	Britannia Inds.	3674.00	3317.30	10.8%	665.91
Tata Consumer products Ltd.	767.35	769.70	-0.3%	1138.22	Nestle India Limited	17503.00	15100.00	15.9%	709.56
Infosys	1569.10	1580.15	-0.7%	7884.23	Hero Motocorp	2946.75	2454.15	20.1%	1197.58
Bajaj Finserv	12380.00	12520.00	-1.1%	2053.38	HUL	2462.00	2000.05	23.1%	1706.22
Tata Consultancy Svs.	3342.00	3399.65	-1.7%	4534.25	Reliance Industries	2089.00	1695.55	23.2%	19654.30

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	25.00	8.5%	61.8%	113.42	Total Kenya Ltd	23.30	-6.8%	-2.9%	0.35
Nairobi Securities Exchange Plc	8.72	6.3%	6.9%	0.01	Diamond Trust Bank Limited	59.00	-1.7%	-21.3%	1.05
Stanbic Holdings	84.00	3.4%	-1.2%	0.01	WPP Scangroup Plc	5.28	-1.5%	-12.0%	0.26
Kenya Power & Lighting Limited	1.33	2.3%	-22.2%	2.32	Kengen Limited	3.93	-0.5%	-16.6%	2.93
NIC Group Plc	25.55	1.6%	-4.5%	0.82	Bamburi Cement Limited	35.00	-0.1%	-7.5%	0.72
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)
Equity Group Holdings Plc	46.65	47.00	-0.7%	193.97	Kengen Limited	3.93	3.90	0.8%	2.93
KCB Group Plc	44.00	44.35	-0.8%	7.73	Standard Chartered Bank Kenya Ltd	130.00	127.00	2.4%	10.10
Nation Media Group	25.00	26.05	-4.0%	113.42	Diamond Trust Bank Limited	59.00	57.50	2.6%	1.05
Safaricom Plc	40.70	43.45	-6.3%	209.01	WPP Scangroup Plc	5.28	5.04	4.8%	0.26
The Cooperative Bank of Kenya Ltd	13.15	14.05	-6.4%	2.55	Centum Investment Company Plc	15.90	14.40	10.4%	1.24

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Gulf General Cooperative Insurance Co.	33.00	10.0%	32.7%	133.66	Astra Industrial Group	49.85	-3.2%	94.0%	120.47
National Company for Learning and Education	62.50	7.0%	19.7%	35.22	Anaam International Holding Group	104.00	-2.4%	13.0%	69.18
Al Hassan Ghazi Ibrahim Shaker Co.	33.20	6.6%	106.0%	768.95	National Gypsum Co.	53.10	-2.4%	90.0%	112.17
Gulf Union Alahlia	22.40	5.9%	9.8%	50.04	Saudi Research and Marketing Group	182.00	-2.2%	131.8%	23.20
Etihad Atheeb Telecommunication Co.	40.50	5.3%	266.2%	309.62	Sahara International Petrochemical Co.	30.20	-2.1%	74.4%	139.49
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)
Theeb Rent a Car Co	71.00	71.00	0.0%	142.13	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	36.20	36.20	0.0%	78.42	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Yanbu National Petrochemical Co.	72.30	72.30	0.0%	27.21	BinDawood Holding Co.	110.80	105.60	4.9%	22.11
Yamama Cement Co.	34.90	34.90	0.0%	14.83	Saudi Airlines Catering Co.	78.90	70.50	11.9%	30.02
Walaa Cooperative Insurance Co.	25.30	25.30	0.0%	43.03	Alkhabeer REIT Fund	9.60	8.11	18.4%	1.26

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Brit.Amer.Tobacco (JSE)	55721.00	1.8%	2.2%	29458.91	Sasol Limited	21811.00	-3.7%	62.9%	35467.11
Naspers Ltd	296661.00	1.7%	-1.7%	291419.89	Firststrand Ltd	5150.00	-3.5%	0.9%	49379.82
Prosus (JSE)	139607.00	1.2%	-13.1%	113296.94	RMB Holdings Ltd	143.00	-3.4%	72.0%	486.48
BHP Group (JSE)	42500.00	0.4%	9.2%	45742.62	Woolworths Hdg.	5279.00	-2.9%	33.5%	10594.49
Multichoice Group	11658.00	0.4%	-13.0%	12273.54	MTN Group	10102.00	-2.9%	67.8%	68352.92
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)
Nepi Rockcastle	9966.00	10264.00	-2.9%	12931.86	Anglogold Ashanti	26517.00	26192.00	1.2%	26610.55
Bid Corporation	30823.00	32250.00	-4.4%	15127.84	Prosus (JSE)	139607.00	136775.00	2.1%	113296.94
Investec Ltd (JSE)	5822.00	6117.00	-4.8%	5520.21	Gold Fields	12808.00	12193.00	5.0%	22628.01
Growthpoint Prop	1454.00	1532.00	-5.1%	19402.79	Vodacom Group	12662.00	12009.00	5.4%	12856.21
Capitec Bank	164600.00	173749.00	-5.3%	30808.68	Naspers Ltd	296661.00	279968.00	6.0%	291419.89

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Tien Phong Commercial Joint Stock Bank	37650.00	4.9%	-51.5%	411311.03	Petrovietnam Gas	95000.00	-3.1%	9.7%	82692.34
Hoang Huy Investment Financial Services	53600.00	3.9%	178.4%	1,372,411.03	Vingroup JSC	116700.00	-0.7%	7.9%	200121.33
Hoa Phat Group JSC	52400.00	3.4%	26.4%	2029369.57	Vinamilk	89200.00	-0.6%	-18.0%	165395.51
Vinhomes	115500.00	3.0%	29.1%	815,623.49	Vietnam National Petroleum Group	94600.00	-0.4%	73.3%	468,222.73
Bank for Inv. and Devp	46900.00	3.0%	-2.1%	311399.65	Vietjet Aviation	115500.00	-0.4%	-7.6%	59274.93
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)
Vinhomes	115500.00	116000.00	-0.4%	826587.30	Vinamilk	89200.00	84269.23	5.9%	164832.68
Military Commercial Bank	43100.00	43300.00	-0.5%	802069.45	Vietjet Aviation	115500.00	94300.00	22.5%	59390.10
Ho Chi Minh City Devp	36000.00	36200.00	-0.6%	192175.20	Hoang Huy Investment Financial Services	22050.00	17314.95	27.3%	84974.09
Viet Nam JSC Bank For Industry And Trade	54400.00	54900.00	-0.9%	756676.80	Vincom Retail	31800.00	24800.00	28.2%	90846.24
Saigon Securities Inc	53900.00	54800.00	-1.6%	519569.05	Bank for Inv. and Devp	46900.00	34958.13	34.2%	313531.19

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