

Daily Market Report

8 July 2021

JSE

JSE All-Share Index jumped 1.45% to close at 66,806.38 points on Wednesday, as all the sectors recorded gains.

BRVM

BRVM Composite Index closed at 160.37 points, up by 0.45% on Wednesday with Crown Siem Côte d'Ivoire and Solibra Côte d'Ivoire being the top gainers.

NSE

NSE All-Share increased by 0.22% to close at 38,501.31 points on Wednesday, as the Insurance, Industrial, Consumer Goods, Oil & Gas and Banking sectors recorded gains.

EGX

EGX 30 Index rebounded by 1.21% and closed at 10,277.27 points on Wednesday, as the market gained LE 6.8 billion of market cap, amid Arab and foreign purchases.

ESG

Casablanca ESG 10 Index closed at 919.28 points on Wednesday, as it increased by 0.44%.

African Markets

Nigeria: NSE 30 Index increased by 0.27% and closed at 1,621.48 points on Wednesday. Custodian and Access were the top gainers.

Egypt: EGX 30 Index rebounded by 1.21% and closed at 10,277.27 points on Wednesday, as the market gained LE 6.8 billion of market cap, amid Arab and foreign purchases.

Kenya: NSE 20 Index increased by 0.41% and closed at 1,939.44 points on Wednesday. Absa Bank Kenya and KCB Group were the top gainers.

South Africa: JSE Top 40 Index rose 1.59% to close at 60,705.57 points on Wednesday, as all the sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.45%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.45%

NSE
Nigerian Stock Exchange ▲ 0.22%

EGX
Egyptian Stock Exchange ▲ 1.21%

ESG
Casablanca Stock Exchange ▲ 0.44%

Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.12

INTERBANK RATES

OBB	10.00 ▲
Overnight	10.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General decreased by 0.22% to close at 6,969.64 points on Wednesday, as Alpha Dubai Holdings and First Abu Dhabi Bank recorded losses. MSCI UAE Index edged down by 0.07% to close at 384.51 points.

Vietnam: VN-30 Index surged 3.38% to close at 1,538.77 points on Wednesday, as the blue chip companies recorded gains. MSCI Vietnam climbed 2.91% to close at 1,056.09 points.

Saudi Arabia: Tadawul All Share Index declined by 0.12% to close at 10,958.55 points on Wednesday, as losses in the Media & Publishing, Transport and Agriculture & Food sectors pushed the shares lower. MSCI Tadawul 30 Index declined by 0.18% to close at 1,462.55 points.

India: Nifty 50 increased by 0.39% to close at 15,879.65 points on Wednesday, as gains in the Metals, Real Estate and Capital Goods sectors pushed the shares higher. MSCI India Index rose 0.40% to close at 1,834.48.

News

Nigeria:

Senate approves Buhari's N2.3tn external borrowing request
N'Assembly Increases Extra Budget By N86.9bn to N982.729bn
Currency in circulation falls by N65.74bn in four months

Kenya:

Kenya seeks Sh3.3bn from Global Fund for Covid war
Insurers bet on digital shift to cut costs, boost services
Jubilee buys additional Sh4.4bn shares in Uganda power plant

Abu Dhabi:

Taqi Group and Abu Dhabi Ports planning 2GW project
Adnic, Ajman Free Zone partner to provide health insurance scheme
Petrochem Middle East, DP World to build \$90mIn chemical terminal in Dubai

Saudi Arabia:

Saudi PIF-owned Sanabil Investments to hike share capital to \$8bn
Saudi's Takween sells 70% of subsidiary SAAF to China's JOFO Nonwoven
Saudi Arabia's Advanced Petrochemical posts record profits

Egypt:

Production index for transformative, extractive industries hikes 8.7% in Q1
Egypt's net foreign reserves rise about \$116M in June: CBE
Egypt to continue exempting its exports from customs for Kenyan market

South Africa:

Equities Property Fund increases capital raise to R1bn
SA listed property rally continues despite Level 4 lockdown
SA banks' earnings likely to recover over next 3 years, S&P says

India:

RBI notifies inclusion of retail, wholesale trade under MSME category
Zomato IPO to open on July 14, list by month-end
RBI penalises 14 banks for non-adherence to rules on lending to NBFCs

Vietnam:

Vietnam Airlines signs 173.7-mln-USD credit deal with three banks
Banks report high profit in H1 despite COVID-19
Forestry product exports expected to reach 15.5 billion USD in 2021

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,969.64	-0.2%	0.3%	2.0%	38.1%	AED/USD	3.67	0.0%	0.0%
Egypt	10,277.25	1.2%	-0.7%	0.2%	-5.2%	EGP/USD	15.69	0.0%	-0.3%
India	15,879.65	0.4%	1.0%	1.0%	13.6%	INR/USD	74.62	0.1%	2.1%
Kenya	1,939.44	0.4%	0.6%	0.6%	3.8%	KES/USD	107.95	0.0%	-1.1%
Nigeria	1,621.48	0.3%	0.8%	1.7%	-1.1%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	10,958.55	-0.1%	-0.7%	-0.2%	26.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,705.57	1.6%	0.7%	0.9%	11.6%	ZAR/USD	14.39	0.0%	-2.1%
Vietnam	1,538.77	3.4%	-1.0%	0.6%	43.7%	VND/USD	23,017.50	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	643.16	0.8%	-0.8%	-0.5%	12.5%	Brent Crude (\$)	73.43	-1.5%	41.5%
MSCI Frontier 100	1,433.41	0.7%	-0.6%	-0.5%	14.0%	Gold (\$)	1,803.55	0.0%	-5.0%
MSCI Emerging	1,340.68	-0.4%	-1.1%	-2.5%	3.8%	Copper (\$)	9,422.31	1.5%	21.6%
MSCI World (USD)	3,049.66	0.2%	0.1%	1.1%	13.4%	Coffee (\$)	137.26	-2.1%	15.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	6.50	4.8%	11.1%	65.75	UBA	7.70	-1.9%	-11.0%	76.50
Access	9.45	2.7%	11.8%	271.73	Ecobank	5.15	-1.0%	-14.2%	21.68
Transnational Corporation	0.91	2.2%	1.1%	21.35	International Breweries	5.30	-0.9%	-10.9%	6.48
Dangote Sugar	18.00	2.0%	2.3%	35.45	United Capital PLC	6.32	-0.2%	51.6%	25.30
Lafarge Africa	21.65	1.6%	2.9%	57.62					
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	158.40	158.40	0.0%	10.87	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	750.00	750.00	0.0%	32.67	UBN	5.60	4.65	20.4%	9.30
Okomu Oil	110.00	110.00	0.0%	1.74	Unilever	13.00	10.50	23.8%	33.74
Nestle	1540.00	1540.00	0.0%	12.10	Cap	19.00	15.25	24.6%	2.19
P Z Cussons	5.80	5.85	-0.9%	4.09	Ecobank	5.15	3.90	32.1%	21.68

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Takaful Company	0.92	13.9%	-8.0%	0.01	Gulf Cement	0.77	-9.5%	-8.3%	0.02
Ras Al Khaimah Cement	2.52	7.7%	221.0%	45.12	Sharjah Cement	0.62	-7.9%	-18.4%	0.38
Abu Dhabi Ship Building	3.75	7.5%	60.9%	7.43	RAK Co. for White Cement & Construction	0.85	-7.6%	0.1%	0.86
Foodco Holding	3.39	5.9%	13.4%	1.25	Gulf Pharmaceutical Ind.	1.74	-1.1%	30.8%	18.32
ZEE STORE PRJSC	9.78	3.2%	-6.9%	11.88	Methaq Takaful Ins.	0.93	-0.9%	6.8%	3.20
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)
Al Buhaira Ntl Ins.	1.79	1.79	0.0%	0.02	Al Wathba National Ins.	0.0	0.00	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Foodco Holding	0.00	0.00	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	1.00	0.0%	0.00	Insurance House	0.79	0.79	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	0.0%	0.00	Al Ain Ahlia Ins.	31.20	31.20	0.0%	0.00
Fujairah Building Industries	1.50	1.50	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£)
Commercial International Bank	54.02	2.5%	-8.7%	89.04	Fawry For Banking Technology And Electronic Payment	18.05	-1.5%	-30.9%	50.03
T M G Holding	6.88	2.2%	4.7%	30.80	Orascom Development	5.29	-0.9%	8.0%	4.05
CI Capital Holding For Financial Investments	3.32	2.2%	-16.8%	3.42	Six of October Development & Investment (SODIC)	16.91	-0.2%	13.9%	0.47
MM Group For Industry And International Trade	9.15	1.8%	16.7%	4.51					
Palm Hills Dev. Company	1.85	1.5%	35.7%	7.83					
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£)
Palm Hills Development Company	1.85	1.89	-1.9%	7.84	Heliopolis Housing	4.53	4.29	5.6%	5.79
Oriental Weavers	8.29	8.88	-6.6%	4.02	Citadel Capital - Common Shares	1.17	1.09	7.2%	4.77
Sidi Kerir Petrochemicals	11.82	12.70	-6.9%	5.97	Credit Agricole Egypt	23.15	21.05	10.0%	3.14
Egyptian Kuwaiti Holding	0.99	1.06	-7.0%	0.09	Ibnsina Pharma	3.66	3.32	10.2%	1.48
Six of October Development & Investment (SODIC)	16.91	18.20	-7.1%	0.47	Emaar Misr for Development	2.34	2.12	10.4%	1.77

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	1225.00	5.0%	90.3%	20025.424	Titan Company	1726.80	-2.0%	10.2%	3796.79
Jsw Steel	691.45	2.7%	78.6%	5830.33	ONGC	120.10	-1.2%	29.1%	2197.25
Hindalco Industries	393.50	2.1%	63.6%	4108.97	Maruti Suzuki India	7450.00	-0.9%	-2.6%	2959.82
Bajaj Finserv	12334.95	2.0%	38.5%	4976.53	SBI Life Insurance	1015.00	-0.8%	12.2%	905.23
UPL	819.00	2.0%	75.6%	3779.08	Reliance Industries	2112.00	-0.6%	6.4%	10179.83
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Divi's Laboratories Limited	4551.00	4583.05	-0.7%	1528.04	Britannia Inds.	3536.95	3317.30	6.6%	1848.17
Tata Consumer products Ltd.	765.05	771.90	-0.9%	1596.32	Hero Motocorp	2915.50	2604.00	12.0%	1941.85
Dr Reddys Lab	5553.90	5614.60	-1.1%	3001.75	Nestle India Limited	17733.00	15100.00	17.4%	960.72
Bajaj Finserv	12334.95	12520.00	-1.5%	4976.53	Reliance Industries	2112.00	1786.25	18.2%	10179.83
Tata Steel	1225.00	1246.85	-1.8%	20025.42	HDFC Life Insurance Company Ltd	684.40	555.95	23.1%	2063.22

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Absa Bank Kenya	10.00	3.3%	3.5%	2.22	Stanbic Holdings	80.50	-3.0%	-5.3%	0.24
KCB Group Plc	43.80	2.0%	15.0%	6.38	WPP Scangroup Plc	5.14	-0.8%	-14.3%	0.67
Equity Group Holdings Plc	47.55	1.6%	30.1%	99.94	Kenya Power & Lighting Limited	1.39	-0.7%	-18.7%	0.37
Centum Investment Company Plc	16.85	1.5%	5.0%	0.34	British American Tobacco Kenya Ltd	448.00	-0.3%	24.1%	1.30
WPP Scangroup Plc	5.18	0.8%	-13.7%	2.22	Safaricom Plc	41.30	-0.2%	20.6%	368.26
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	47.55	48.00	-0.9%	99.94	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	5.62
KCB Group Plc	43.80	44.35	-1.2%	6.38	Kengen Limited	4.00	3.90	2.6%	2.14
The Cooperative Bank of Kenya Ltd	13.55	14.05	-3.6%	3.13	Diamond Trust Bank Limited	59.00	57.50	2.6%	1.91
Nation Media Group	24.95	26.05	-4.2%	2.60	WPP Scangroup Plc	5.18	5.04	2.8%	2.22
Safaricom Plc	41.40	43.45	-4.7%	271.56	Stanbic Holdings	80.00	72.25	10.7%	0.02

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al-Omran Industrial & Trading Co	126.80	9.9%	34.0%	379.04	Alkhorayef Water and Power Technologies Co.	115.00	-2.9%	22.9%	49.89
Rabigh Refining and Petrochemical Co.	26.95	7.4%	95.0%	203.10	Gulf Union Alahlia	21.34	-2.8%	4.6%	13.95
Al Moammar Information Systems Co.	164.20	5.1%	70.7%	351.16	AlAhli REIT Fund 1	12.18	-2.7%	36.5%	6.07
Saudi Industrial Investment Group	35.90	4.7%	31.0%	233.24	Arab Sea Information System	138.40	-2.5%	61.9%	181.01
Zahrat Al Waha for Trading Co.	93.20	4.6%	17.7%	138.31	Middle East Healthcare Co.	38.65	-2.5%	10.3%	94.11
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	72.70	72.70	0.0%	171.93	Nt Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Al-Omran Industrial & Trading Co	126.80	126.80	0.0%	379.04	BinDawood Holding Co.	108.40	105.60	2.7%	7.89
Zamil Industrial Investment Co.	42.90	42.90	0.0%	73.30	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Walaa Cooperative Insurance Co.	25.15	25.15	0.0%	12.78	Saudi Airlines Catering Co.	76.60	70.50	8.7%	35.25
United Wire Factories Co.	39.35	39.35	0.0%	14.98	Savola Group	42.70	36.60	16.7%	30.99

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum	178864.00	5.0%	23.9%	39822.10	Redefine Properties	424.00	-4.1%	27.3%	3801.83
Northam Platinum	23729.00	4.5%	13.2%	24478.98	MTN Group	10184.00	-1.8%	69.2%	65253.95
Impala Platinum	25316.00	3.2%	25.4%	72607.12	Brit.Amer.Tobacco	54897.00	-1.2%	0.6%	25339.08
Clicks Group	25711.00	3.1%	1.8%	22317.25	Investec Plc	5403.00	-1.1%	47.5%	9769.88
Sibanye Stillwater	6213.00	3.0%	3.6%	85160.26	Investec Ltd	5650.00	-1.1%	50.1%	10063.17
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)
Bid Corporation	32133.00	32350.00	-0.7%	13127.49	Prosus (JSE)	135066.00	130401.00	3.6%	156294.73
Nepi Rockcastle	10497.00	10636.00	-1.3%	14956.21	Naspers Ltd	286358.00	275000.00	4.1%	319796.88
Growthpoint Prop	1544.00	1575.00	-2.0%	22678.11	Vodacom Group	12819.00	12009.00	6.7%	10583.85
Shoprite Limited	16016.00	16384.00	-2.2%	14884.07	Brit.Amer.Tobacco	54897.00	50757.00	8.2%	25339.08
Mondi	38738.00	39989.00	-3.1%	8862.75	Gold Fields	13331.00	12193.00	9.3%	46938.90

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Mobile World Inv. Corp	165800.00	7.0%	39.4%	235465.31	BaoViet Holdings	54500.00	-2.5%	-17.4%	112455.30
Phu Nhuan Jewelry	106500.00	6.9%	31.5%	187250.06	PetroVietnam Power Corporation	11400.00	-0.4%	-16.2%	122864.64
Petrovietnam Gas	91500.00	6.6%	5.7%	124.258.87	Vietnam Prosperity	70700.00	-0.4%	117.5%	1185087.54
Masan Group Corp	116000.00	6.4%	30.5%	275821.69					
Hoang Huy Investment Financial Services	21900.00	6.3%	13.8%	205008.02					
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)
Masan Group Corp	116000.00	116000.00	0.0%	286508.40	Vinamilk	89800.00	84269.23	6.6%	425535.26
Phat Dat Real Estate Development Corp	96200.00	97500.00	-1.3%	443501.24	Vincom Retail	30900.00	25050.00	23.4%	168649.11
Vinhomes	117000.00	120400.00	-2.8%	827342.10	Hoang Huy Investment Financial Services	21900.00	17314.95	26.5%	222464.58
Mobile World Inv. Corp	165800.00	170700.00	-2.9%	241686.66	Vietjet Aviation	121800.00	94300.00	29.2%	102287.64
Vietcombank	113400.00	117200.00	-3.2%	303889.32	Bank for Inv. and Devp	45500.00	34958.13	30.2%	179433.80

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