

Daily Market Report

9 July 2021

JSE

JSE All-Share Index dropped 2.34% to close at 65,243.50 points on Thursday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 160.70 points, up by 0.21% on Thursday with Sicom Côte d'Ivoire and Tractafrica Motors Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased marginally by 0.08% to close at 38,469.87 points on Thursday, as the Consumer Goods and Banking sectors recorded losses.

EGX

EGX 30 Index declined by 0.90% and closed at 10,184.80 points on Thursday, as the market lost LE 6.2 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 920.92 points on Thursday, as it increased by 0.18%.

African Markets

Nigeria: NSE 30 Index slipped by 0.03% and closed at 1,621.07 points on Thursday. Nascon and Access were the top losers.

Egypt: EGX 30 Index declined by 0.90% and closed at 10,184.80 points on Thursday, as the market lost LE 6.2 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index increased by 0.29% and closed at 1,945.11 points on Thursday. KCB Group and Equity Group Holdings were the top gainers.

South Africa: JSE Top 40 Index dipped by 2.63% to close at 59,106.40 points on Thursday, as all the sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 2.34%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 0.21%

NSE Nigerian Stock Exchange ▼ 0.08%

EGX Egyptian Stock Exchange ▼ 0.90%

ESG Casablanca Stock Exchange ▲ 0.18%

Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.11
INTERBANK RATES	
OBB	11.25 ▲
Overnight	11.75 ▲

Other Emerging Markets

Abu Dhabi: ADX General decreased marginally by 0.09% to close at 6,963.23 points on Thursday, as Aldar Properties and First Abu Dhabi Bank recorded losses. MSCI UAE Index was down by 0.20% to close at 383.75 points.

Vietnam: VN-30 Index declined by 1.14% to close at 1,521.21 points on Thursday, as the blue chip companies recorded losses. MSCI Vietnam dropped by 1.80% to close at 1,037.11 points.

Saudi Arabia: Tadawul All Share Index fell 1.22% to close at 10,825.01 points on Thursday, as losses in the Energy & Utilities, Financial Services and Building & Construction sectors led shares lower. MSCI Tadawul 30 Index declined 1.26% to close at 1,444.06 points.

India: Nifty 50 decreased by 0.96% to close at 15,727.90 points on Thursday, as losses in the Metals, Banking and Public Sector Undertakings sectors pushed the shares lower. MSCI India Index declined by 0.76% to close at 1,820.46.

News

Nigeria:

FG plans recovering N37bn debt from airlines, says Emirates ban stays
BUA Cement posts N209.4bn revenue, plans expansion
FIRS Goes After Multichoice, Mandates Banks to Recover N1.82trn Tax Debt

Kenya:

Kenya, America trade deal faces fresh hurdle in Congress
Struggling State Companies Pose \$3.5 Billion Risk to Kenya
Value of unused Safaricom airtime, data hits Sh5.7bn

Abu Dhabi:

Mubadala's Yahsat IPO draws investors, could raise \$735 mln
ADNOC brings in Japanese energy firms for blue ammonia
Abu Dhabi property firm pulls \$350m sukuk

Saudi Arabia:

Saudi's Tourism Development Fund deploys 'Cloud First' strategy with Oracle
Saudi Aramco looks to raise billions with more asset sales
PIF-backed ACWA Power plans to invest \$16bn in new projects in 2021

Egypt:

Egypt's annual inflation records 5.3% during June, rises 0.3% monthly
Egypt's annual core inflation records 3.8% in June: CBE
American co plans to inject investments of \$5B in Egypt within 5 years

South Africa:

DP World's R12.8bn offer for SA's Imperial Logistics
Mr Price gets CompCom backing for R500m Yuppiechef deal
SA's gross reserves stable, boosted by a rise in foreign exchange

India:

TCS revenue grows 16.4% in Q1 on low base effect
Private equity inflows jump 118% in H1 to \$11.82 billion
Auto retail picks up pace in June with nearly 23% rise

Vietnam:

Hanoi eyes 15 million domestic holiday-makers in 2021
Ben Tre's export turnover up 14.1 percent in six months
Cement, tiles and glass production see massive surplus

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	6,963.23	-0.1%	0.9%	1.9%	38.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,184.80	-0.9%	-0.7%	-0.7%	-6.1%	EGP/USD	15.69	0.0%	-0.3%
India	15,727.90	-1.0%	0.0%	0.0%	12.5%	INR/USD	74.72	0.1%	2.3%
Kenya	1,945.11	0.3%	0.9%	0.9%	4.1%	KES/USD	107.95	0.0%	-1.1%
Nigeria	1,621.07	-0.03%	0.8%	1.6%	-1.2%	NGN/USD	410.50	-0.2%	4.0%
Saudi Arabia	10,825.01	-1.2%	-1.4%	-1.4%	24.6%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,106.40	-2.6%	-2.0%	-1.8%	8.7%	ZAR/USD	14.34	-0.3%	-2.3%
Vietnam	1,521.21	-1.1%	-2.1%	-0.5%	42.1%	VND/USD	23,020.00	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	640.44	-0.4%	-1.3%	-0.9%	12.0%	Brent Crude (\$)	74.12	0.9%	42.8%
MSCI Frontier 100	1,430.39	-0.2%	-0.9%	-0.7%	13.7%	Gold (\$)	1,798.31	-0.3%	-5.2%
MSCI Emerging	1,316.25	-1.8%	-2.9%	-4.2%	1.9%	Copper (\$)	9,287.50	-1.4%	19.9%
MSCI World (USD)	3,022.24	-0.9%	-0.8%	0.2%	12.3%	Coffee (\$)	138.8	1.1%	16.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	0.95	4.4%	5.6%	32.14	Nascon	15.10	-4.1%	4.1%	7.47
Seplat Petroleum	770.00	2.7%	91.4%	315.36	Access	9.15	-3.2%	8.3%	48.69
Wema	0.75	1.4%	8.7%	8.77	UBA	7.50	-2.6%	-13.3%	54.27
Lafarge Africa	21.80	0.7%	3.6%	16.39	FCMB	3.02	-2.3%	-9.3%	11.17
UACN	9.80	0.5%	35.2%	22.46	Fidelity	2.31	-0.9%	-8.3%	47.42
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	158.40	158.40	0.0%	9.68	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	315.36	UBN	5.60	4.65	20.4%	4.61
Okomu Oil	110.00	110.00	0.0%	0.67	Unilever	13.00	10.50	23.8%	2.50
Nestle	1540.00	1540.00	0.0%	33.81	Cap	19.00	15.25	24.6%	1.19
P Z Cussons	5.80	5.85	-0.9%	8.65	Ecobank	5.15	3.90	32.1%	1.37

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Marine Dredging	10.12	14.9%	68.4%	12.22	Union Insurance Co	0.61	-10.0%	-12.6%	0.03
Al Qudra Holding	1.13	14.1%	2.7%	4.62	National Corp for Tourism and Hotels	3.10	-3.1%	71.3%	0.05
Bank of Sharjah PJSC	0.59	8.8%	-6.2%	0.06	Abu Dhabi National Ins. Co	4.99	-3.1%	-2.2%	6.46
Abu Dhabi National for Building Materials	0.29	8.5%	13.1%	0.02	National Bank of Ras Al Khaimah	3.83	-3.0%	-1.8%	0.05
Ras Al Khaimah Cement	2.71	7.5%	245.2%	37.19	Ras Al Khaimah Ceramics	2.19	-2.2%	46.0%	1.56
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%	0.00	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	0.00	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
Al Qudra Holding	1.13	1.13	0.0%	4.89	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£)
Palm Hills Development Company	1.91	3.1%	39.9%	66.63	Fawry For Banking Technology And Electronic Payment	17.22	-4.6%	-34.1%	45.24
Sidi Kerir Petrochemicals	11.98	1.4%	28.7%	10.94	Pioneers Holding	4.20	-2.6%	4.5%	8.11
Commercial International Bank (Egypt)	54.18	0.3%	-8.5%	92.56	Cleopatra Hospital Company	4.34	-2.5%	-8.8%	3.98
Citadel Capital - Common Shares	1.17	0.2%	-18.5%	6.07	MM Group For Industry And International Trade	8.93	-2.4%	13.9%	7.38
					Medinet Nasr Housing	3.25	-2.1%	-14.9%	7.04
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	1.91	1.96	-2.7%	66.64	Heliopolis Housing	4.52	4.29	5.4%	3.21
Sidi Kerir Petrochemicals	11.98	12.70	-5.7%	10.93	Citadel Capital - Common Shares	1.17	1.09	7.4%	6.07
Six of October Development & Investment (SODIC)	16.88	18.20	-7.3%	0.45	Credit Agricole Egypt	22.71	21.05	7.9%	7.67
Oriental Weavers	8.15	8.88	-8.2%	4.21	Ibnsina Pharma	3.62	3.32	9.0%	2.25
Egyptian Kuwaiti Holding	0.98	1.06	-8.4%	0.19	Emaar Misr for Development	2.32	2.12	9.4%	0.79

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1060.40	1.4%	9.0%	2291.600	Tata Motors	306.15	-3.5%	66.5%	27046.76
SBI Life Insurance	1023.45	0.9%	13.2%	882.92	Jsw Steel	668.80	-3.1%	72.7%	4806.52
Eicher Motors	2732.00	0.8%	7.9%	1387.08	Hindalco Industries	382.85	-2.7%	59.2%	4757.58
Bajaj Auto	4073.00	0.6%	18.3%	2555.84	Tata Steel	1190.00	-2.4%	84.9%	14955.87
Indusind Bank	1046.00	0.1%	16.9%	4350.01	ONGC	117.10	-2.3%	25.8%	2024.09
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tata Consumer products Ltd.	762.25	771.90	-1.3%	1170.53	Britannia Inds.	3490.00	3317.30	5.2%	2189.09
Bajaj Finserv	12351.00	12520.00	-1.3%	2551.16	Hero Motocorp	2907.00	2604.00	11.6%	1527.38
Divi's Laboratories Limited	4509.00	4583.05	-1.6%	939.05	Nestle India Limited	17620.00	15100.00	16.7%	525.79
Asian Paints	3034.00	3092.85	-1.9%	2752.80	Reliance Industries	2091.00	1786.25	17.1%	10827.89
Infosys	1560.40	1591.00	-1.9%	5189.10	HUL	2449.05	2000.05	22.4%	2728.39

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
KCB Group Plc	45.50	3.9%	19.4%	75.04	Total Kenya Ltd	24.00	-3.4%	0.0%	0.48
Equity Group Holdings Plc	49.00	3.0%	34.1%	92.66	Centum Investment Company Plc	16.55	-1.8%	3.1%	4.62
East African Breweries Limited	187.00	1.2%	21.2%	73.73	Bamburi Cement Limited	36.95	-1.6%	-2.4%	0.33
British American Tobacco Kenya Ltd	445.25	1.1%	23.3%	2.27	WPP Scangroup Plc	5.10	-1.5%	-15.0%	2.38
Kenya Reinsurance Corporation Ltd	2.39	0.4%	3.0%	0.55	Kenya Power & Lighting Limited	1.37	-1.4%	-19.9%	5.69
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	49.00	49.45	-0.9%	92.66	WPP Scangroup Plc	5.10	5.04	1.2%	2.38
KCB Group Plc	45.50	46.50	-2.2%	75.04	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	7.14
The Cooperative Bank of Kenya Ltd	13.60	14.05	-3.2%	4.40	Kengen Limited	4.00	3.90	2.6%	5.53
East African Breweries Limited	187.00	194.00	-3.6%	73.73	Diamond Trust Bank Limited	59.00	57.50	2.6%	2.61
Nation Media Group	25.00	26.05	-4.0%	68.79	Stanbic Holdings	80.00	72.25	10.7%	0.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Gulf Union Alahlia	22.82	6.9%	11.9%	65.24	Al Moammar Information Systems Co.	158.00	-3.8%	64.2%	183.62
Arabian Pipes Co.	22.16	3.3%	23.5%	136.07	Fitaihi Holding Group	33.60	-3.7%	89.0%	94.39
Alkhorayef Water and Power Technologies Co.	118.40	3.0%	26.5%	243.57	Rabigh Refining and Petrochemical	26.00	-3.5%	88.1%	167.36
Al Yamamah Steel Industries	54.10	2.9%	82.5%	219.21	Ataa Educational	55.20	-3.5%	39.7%	4.57
Swicorp Wabel REIT Fund	9.11	2.2%	22.9%	237.76	Baazeem Trading	153.80	-3.3%	70.5%	121.32
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	72.10	72.10	0.0%	114.86	Nt Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	41.70	41.70	0.0%	61.07	BinDawood Holding Co.	108.20	105.60	2.5%	16.46
Walaa Cooperative Insurance Co.	25.00	25.00	0.0%	14.01	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	39.55	39.55	0.0%	7.92	Saudi Airlines Catering Co.	76.40	70.50	8.4%	15.41
United Electronics Co.	130.00	130.00	0.0%	28.21	Savola Group	42.35	36.60	15.7%	26.81

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Growthpoint Prop	1574.00	1.9%	25.2%	22479.18	Northam Platinum	21730.00	-8.4%	3.7%	48276.13
ABSA Group	13520.00	1.5%	12.8%	32435.87	Multichoice Group	11100.00	-7.4%	-17.2%	34342.48
Bidvest Group	19243.00	1.5%	22.6%	11282.59	Impala Platinum	23476.00	-7.3%	16.3%	113411.92
MTN Group	10311.00	1.2%	71.3%	43305.29	Anglo American Platinum	167545.00	-6.3%	16.1%	85902.83
Mr Price Group	20826.00	1.2%	22.0%	23125.17	Sibanye Stillwater	5865.00	-5.6%	-2.3%	75678.10
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)
Growthpoint Prop	1574.00	1580.00	-0.4%	22479.18	Prosus	129925.00	129914.00	0.0%	111493.32
Bid Corporation	32370.00	32605.00	-0.7%	26800.74	Naspers Ltd	275000.00	272700.00	0.8%	307525.63
Shoprite Limited	16105.00	16384.00	-1.7%	21630.37	Gold Fields	12931.00	12193.00	6.1%	37115.50
Nepi Rockcastle	10507.00	10700.00	-1.8%	14236.17	Vodacom Group	12799.00	12009.00	6.6%	14687.29
Aspen PhmcR.Hdg.	16650.00	17328.00	-3.9%	19720.73	Brit.Amer.Tobacco	54200.00	50757.00	6.8%	32956.42

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	172500.00	4.0%	45.1%	272279.81	No Va Land Invest	110800.00	-6.1%	69.8%	1079205.29
Masan Group Corp	119800.00	3.3%	34.8%	294873.86	Hoang Huy Investment Financial Services	21050.00	-3.9%	9.4%	69742.25
Petrovietnam Gas	93000.00	1.6%	7.4%	83920.91	Vincom Retail	29900.00	-3.2%	-4.8%	107400.42
BaoViet Holdings	54900.00	0.7%	-16.8%	56961.63	Sai Gon Thuong Tin Commercial	30200.00	-2.7%	78.7%	987309.01
Tien Phong Commercial Joint Stock Bank	37750.00	0.7%	-51.4%	219218.55	Vingroup JSC	111000.00	-2.6%	2.6%	164859.16
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	172500.00	175200.00	-1.5%	273533.25	Vinamilk	88400.00	84269.23	4.9%	168746.76
Phu Nhuan Jewelry	105600.00	108000.00	-2.2%	91565.76	Vincom Retail	29900.00	25050.00	19.4%	107750.63
Phat Dat Real Estate Development Corp	94700.00	97500.00	-2.9%	248530.68	Hoang Huy Investment Financial Services	21050.00	17314.95	21.6%	69778.65
Techcombank	56600.00	58600.00	-3.4%	1548711.84	Vietjet Aviation	120300.00	94300.00	27.6%	59524.44
Khang Dien House Trading and Investment JSC	36750.00	38100.00	-3.5%	99666.00	Bank for Inv. and Devp	45800.00	34958.13	31.0%	97434.92

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