

# Daily Market Report

## 14 July 2021

### JSE

JSE All-Share Index declined by 0.30% to close at 67,088.25 points on Tuesday, as the Industrial and Financial sectors recorded losses.

### BRVM

BRVM Composite Index closed at 159.57 points, down by 0.27% on Tuesday with Oragroup Togo and SMB Côte d'Ivoire being the top losers.

### NSE

NSE All-Share inched down 0.002% to close at 37,857.24 points on Tuesday, as the Insurance and Oil & Gas sectors recorded losses.

### EGX

EGX 30 Index advanced by 1.94% and closed at 10,431.99 points on Tuesday, as the market gained LE 4.76 billion of market cap, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index closed at 918.02 points on Tuesday, as it increased marginally by 0.08%.

## African Markets

**Nigeria:** NSE 30 Index declined marginally by 0.003% and closed at 1,613.78 points on Tuesday. Custodian and FBNH were the top losers.

**Egypt:** EGX 30 Index advanced by 1.94% and closed at 10,431.99 points on Tuesday, as the market gained LE 4.76 billion of market cap, amid Arab and foreign buying.

**Kenya:** NSE 20 Index increased by 0.49% and closed at 1,953.37 points on Tuesday. Stanbic Holdings and Diamond Trust Bank were the top gainers.

**South Africa:** JSE Top 40 Index decreased by 0.23% to close at 60,943.22 points on Tuesday, as the Industrial and Financial sectors recorded losses.

## Capital Markets

### JSE

Johannesburg Stock Exchange ▼ 0.30%

### BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.27%

### NSE

Nigerian Stock Exchange ▼ 0.002%

### EGX

Egyptian Stock Exchange ▲ 1.94%

### ESG

Casablanca Stock Exchange ▲ 0.08%

## Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.11
INTERBANK RATES	
OBB	18.50 ▲
Overnight	19.00 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.34% to close at 7,046.47 points on Tuesday, as First Abu Dhabi Bank and Aldar Properties recorded gains. MSCI UAE Index was up by 0.36% to close at 383.80 points.

**Vietnam:** VN-30 Index declined by 0.15% to close at 1,440.87 points on Tuesday, as the blue chip companies recorded losses. MSCI Vietnam declined by 0.44% to close at 977.96 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.35% to close at 10,735.85 points on Tuesday, as gains in the Retail, Telecoms & IT and Petrochemicals sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 0.47% to close at 1,431.97 points.

**India:** Nifty 50 increased by 0.76% to close at 15,812.35 points on Tuesday as gains in the Banking, Metals and Oil & Gas sectors pushed the shares higher. MSCI India Index rose 0.53% to close at 1,830.79.

## News

### Nigeria:

Emefiele: N15tn Infrastructure Company to Take off Third Quarter  
Nigeria Hires Money Managers for \$37 Billion Infrastructure Fund  
Nigeria to Sell 36 Assets to Boost Revenue as Oil Earnings Fall

### Kenya:

NSE foreign investor outflows slow down as market recovers  
IMF cites inflation risk in Kenya deal  
Treasury publishes draft rules for online funding

### Abu Dhabi:

UAE's Julphar acquires full control of Planet Pharmacies  
Abu Dhabi hotel occupancy hits highest since Feb 2020  
UAE's industrial giant completes second phase expansion

### Saudi Arabia:

Saudi Arabia eyes \$30bln in mining investment by 2025  
Saudi Arabia's insurance firms eye M&A to expand market share  
ESG framework may pave way for first Saudi PIF green bond sale

### Egypt:

CBE launches LE100B initiative for mortgage financing  
CI Capital approves in principle offer to sell Souhoola  
CIB's profit rises 22% in H1

### South Africa:

AngloGold makes R5.4bn offer to expand its exploration in Nevada  
Rand sinks to three-month low, bonds drop on violent protests  
Commercial property activity improves mildly in second quarter

### India:

Zomato raises Rs 4,196 crore from anchor investors ahead of IPO  
BPCL keen on investing Rs 1,000 crore in setting up ethanol plant in Telangana  
Maruti Suzuki plans to invest up to Rs 18,000 crore for 10 lakh unit plant

### Vietnam:

Banks agree to cut lending rates to support hard-hit businesses  
No Va Land issues US\$300 million of international convertible bonds  
Cà Mau Fertiliser's profit before tax expected to rise 8% in 1H21

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,046.47	0.3%	1.2%	3.1%	39.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,431.99	1.9%	2.4%	1.7%	-3.8%	EGP/USD	15.69	0.0%	-0.3%
India	15,812.35	0.8%	0.8%	0.6%	13.1%	INR/USD	74.49	-0.1%	2.0%
Kenya	1,953.37	0.5%	0.1%	1.3%	4.5%	KES/USD	108.00	0.0%	-1.1%
Nigeria	1,613.78	-0.003%	-0.4%	1.2%	-1.6%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	10,735.85	0.3%	-0.8%	-2.3%	23.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,943.22	-0.2%	1.2%	1.3%	12.1%	ZAR/USD	14.61	1.3%	-0.5%
Vietnam	1,440.87	-0.2%	-3.6%	-5.8%	34.6%	VND/USD	23,013.00	0.0%	-0.3%

## MSCI Emerging Markets

MSCI Frontier	630.52	-0.1%	-0.8%	-2.5%	10.3%	Brent Crude (\$)	76.49	1.8%	47.4%
MSCI Frontier 100	1,412.50	-0.1%	-0.7%	-1.9%	12.3%	Gold (\$)	1,812.59	0.5%	-4.5%
MSCI Emerging	1,339.51	1.0%	1.6%	-2.6%	3.7%	Copper (\$)	9,375.25	0.0%	21.0%
MSCI World (USD)	3,059.28	-0.3%	0.2%	1.4%	13.7%	Coffee (\$)	141.59	1.3%	18.8%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.81	9.5%	17.4%	28.06	Custodian	6.10	-6.2%	4.3%	30.60
International Breweries	5.30	6.0%	-10.9%	8.92	FBNH	7.20	-4.0%	0.7%	49.98
Ecobank	5.20	2.0%	-13.3%	7.02	P Z Cussons	5.70	-1.7%	7.5%	3.17
UACN	9.90	1.5%	36.6%	35.58	United Capital PLC	6.22	-1.3%	49.2%	45.87
Sterling	1.59	1.3%	-22.1%	3.26	Zenith	24.30	-0.4%	-2.0%	158.23
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%	4.59	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	156.29	UBN	5.60	4.65	20.4%	0.14
Okomu Oil	110.00	110.00	0.0%	2.29	Unilever	13.00	10.50	23.8%	11.85
Nestle	1540.00	1540.00	0.0%	42.05	Cap	19.00	15.25	24.6%	0.07
P Z Cussons	5.70	5.85	-2.6%	3.17	Ecobank	5.20	3.90	33.3%	7.02

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Qudra Holding	1.70	14.9%	54.5%	2.32	Abu Dhabi National Takaful	7.25	-9.9%	85.9%	0.05
PALMS SPORTS	12.40	6.4%	-6.1%	12.94	Methaq Takaful Ins.	0.97	-7.2%	12.2%	11.33
Eshraq Investments	0.35	3.8%	11.0%	2.70	National Takaful Company	0.80	-5.9%	-20.0%	0.20
Manazel PJSC	0.36	3.1%	3.4%	12.98	ESG EMIRATES STALLIONS GROUP P.J.S.C	3.71	-3.1%	-10.8%	1.12
Ras Al Khaimah Poultry	1.70	3.0%	17.2%	0.02	National Bank of Umm Al Qaiwain	1.75	-2.8%	-12.5%	0.15
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	1.70	1.70	0.0%	2.32	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)
Fawry For Banking Technology And Electronic Payment	18.59	7.5%	-28.9%	54.82	Edita Food Industries S.A.E	7.80	-2.5%	-12.4%	3.15
Ezz Steel	12.75	3.8%	18.8%	25.34	Eastern Company	11.48	-1.4%	-12.0%	6.04
Commercial International Bank (Egypt)	55.67	2.5%	-5.9%	98.07	Abou Kir Fertilizers	19.07	-0.4%	-7.8%	0.24
Export Development Bank of Egypt (EDBE)	10.87	2.2%	-24.0%	0.50					
Sidi Kerir Petrochemicals	12.16	1.8%	30.6%	12.58					
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)
Palm Hills Development Company	1.88	1.96	-3.9%	4.57	Citadel Capital - Common Shares	1.16	1.09	6.0%	15.17
Sidi Kerir Petrochemicals	12.16	12.70	-4.3%	12.58	Heliopolis Housing	4.63	4.29	7.9%	4.27
Six of October Development & Investment (SODIC)	17.18	18.20	-5.6%	1.48	Ibnsina Pharma	3.62	3.32	9.0%	6.30
Egyptian Kuwaiti Holding	1.00	1.06	-6.4%	1.32	CI Capital Holding For Financial Investments	3.24	2.97	9.1%	1.37
Telecom Egypt	13.69	14.80	-7.5%	5.41	Credit Agricole Egypt	23.04	21.05	9.5%	8.65

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Icici Bank	664.00	2.8%	24.1%	13115.699	Adani Ports And Sez.	704.35	-1.9%	45.6%	8684.84
Grasim Industries	1577.00	2.7%	70.0%	3391.82	Dr Reddys Lab	5440.00	-1.0%	4.5%	2024.66
HDFC	2542.10	2.6%	-0.6%	9402.73	Hcl Technologies	970.00	-1.0%	2.5%	2904.53
Axis Bank	771.00	2.3%	24.3%	7528.16	Tata Consumer products Ltd.	771.00	-0.6%	30.7%	1157.90
SBI Life Insurance	1055.00	2.1%	16.7%	2645.95	Tech Mahindra	1050.40	-0.6%	7.9%	2007.28
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
SBI Life Insurance	1055.00	1056.50	-0.1%	2645.95	Britannia Inds.	3484.00	3317.30	5.0%	635.87
Grasim Industries	1577.00	1582.15	-0.3%	3391.82	Hero Motocorp	2903.25	2604.00	11.5%	922.52
Divi's Laboratories Limited	4603.95	4625.00	-0.5%	1072.74	Reliance Industries	2099.00	1798.00	16.7%	6500.98
Ultratech Cement	7120.00	7160.00	-0.6%	2656.20	Nestle India Limited	17672.00	15100.00	17.0%	442.43
Bajaj Finserv	12900.55	12998.80	-0.8%	3534.60	HUL	2436.00	2000.05	21.8%	2423.42

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	83.75	4.4%	-1.5%	0.08	Nairobi Securities Exchange Plc	8.58	-1.8%	5.1%	0.13
Diamond Trust Bank Limited	59.50	2.6%	-20.7%	13.24	Equity Group Holdings Plc	48.00	-1.3%	31.3%	13.69
East African Breweries Limited	188.25	2.0%	22.0%	8.36	Absa Bank Kenya	10.00	-1.0%	3.5%	1.09
Kenya Power & Lighting Limited	1.39	1.5%	-18.7%	0.68	Centum Investment Company Plc	17.00	-0.9%	5.9%	0.24
British American Tobacco Kenya Ltd	441.50	1.3%	22.3%	0.40	WPP Scangroup Plc	5.00	-0.4%	-16.7%	2.81
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)
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	0.73	Standard Chartered Bank Kenya Ltd	130.25	127.00	2.6%	1.77
Equity Group Holdings Plc	48.00	49.45	-2.9%	13.69	Kengen Limited	4.00	3.90	2.6%	3.60
East African Breweries Limited	188.25	194.00	-3.0%	8.36	Diamond Trust Bank Limited	59.50	57.50	3.5%	13.24
Nation Media Group	25.00	26.05	-4.0%	11.55	WPP Scangroup Plc	5.00	4.80	4.2%	2.81
KCB Group Plc	44.75	47.00	-4.8%	67.94	Stanbic Holdings	83.75	72.25	15.9%	0.08

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arabian Shield Cooperative Insurance Co.	24.52	5.6%	1.3%	73.16	Alahli Takaful Co.	37.05	-6.0%	6.2%	50.80
Al Moammar Information Systems Co.	162.40	4.9%	68.8%	196.26	Saudia Dairy and Foodstuff Co.	173.20	-3.9%	-1.0%	16.58
Al-Omran Industrial & Trading Co	123.80	4.0%	30.9%	199.52	Amana Cooperative Insurance Co.	60.50	-2.4%	62.9%	17.50
Baazeem Trading Co.	152.40	3.7%	69.0%	209.65	The Mediterranean and Gulf Insurance and Reinsurance	25.20	-2.3%	6.2%	13.20
Nama Chemicals Co.	46.30	3.6%	39.0%	38.80	Alujain Holding Corp.	57.30	-2.1%	21.8%	55.22
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	71.10	71.10	0.0%	39.60	Nt Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	42.50	42.50	0.0%	54.85	BinDawood Holding Co.	107.00	105.60	1.3%	37.24
United Electronics Co.	134.00	134.00	0.0%	33.26	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Cooperative Assurance Co.	28.60	28.60	0.0%	7.94	Saudi Airlines Catering Co.	75.80	70.50	7.5%	7.71
Takween Advanced Industries	23.26	23.26	0.0%	26.73	Savola Group	41.15	36.60	12.4%	12.84

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum	23095.00	4.9%	10.2%	32788.23	Mr Price Group	19790.00	-5.9%	16.0%	37873.81
Impala Platinum	25028.00	4.5%	24.0%	79188.52	Firststrand Ltd	5319.00	-5.4%	4.2%	129050.17
Prosus (JSE)	136588.00	2.7%	-15.0%	161163.73	Nedbank Group	16454.00	-5.3%	27.1%	46653.16
Anglogold Ashanti	29192.00	2.7%	-14.8%	32763.76	Bidvest Group	18206.00	-5.1%	15.9%	27007.64
Anglo American Platinum	173071.00	2.6%	19.9%	37666.65	ABSA Group	13014.00	-5.1%	8.6%	47554.21
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)
Mondi (JSE)	39875.00	40000.00	-0.3%	13657.87	Naspers Ltd	281937.00	268500.00	5.0%	614998.76
Aspen PhmcR.Hdg.	17169.00	17352.00	-1.1%	19727.16	Prosus (JSE)	136588.00	128906.00	6.0%	161163.73
Nepi Rockcastle	10486.00	10700.00	-2.0%	10464.93	Vodacom Group	12918.00	12009.00	7.6%	14553.33
Investec Plc	5651.00	5860.00	-3.6%	6199.31	Spar Group	17617.00	16103.00	9.4%	12384.24
Bid Corporation	32100.00	33389.00	-3.9%	46289.13	Brit.Amer.Tobacco (JSE)	56337.00	50757.00	11.0%	26211.97

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Thanh Thanh Cong Tay Ninh	18000.00	6.8%	-14.1%	76391.93	Phat Dat Real Estate Devp Corp	87000.00	-4.3%	362.8%	241013.80
Hoang Huy Investment Financial Services	19650.00	4.8%	2.1%	104625.68	Masan Group Corp	115000.00	-4.1%	29.4%	176776.90
Saigon Securities Inc	51800.00	4.7%	56.5%	627150.83	Vietcombank	103400.00	-3.5%	5.6%	193844.29
Petrovietnam Gas	91500.00	4.0%	5.7%	52863.54	Phu Nhuan Jewelry	99200.00	-2.8%	22.5%	53375.24
PetroVietnam Power Corp	10550.00	3.9%	-94.6%	110596.60	Vinamilk	84300.00	-2.3%	-22.5%	245046.15
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)
Khang Dien House Trading and Investment JSC	36300.00	38100.00	-4.7%	56163.36	Vinamilk	84300.00	84200.00	0.1%	243062.19
Masan Group Corp	115000.00	122500.00	-6.1%	175018.50	Vincom Retail	27850.00	25050.00	11.2%	78431.17
Petrovietnam Gas	91500.00	97500.00	-6.2%	53188.95	Hoang Huy Investment Financial Services	19650.00	17314.95	13.5%	107750.78
Techcombank	53900.00	58600.00	-8.0%	1081902.36	Bank for Inv. and Devp	42400.00	34958.13	21.3%	84058.00
FPT Corp	87000.00	95000.00	-8.4%	192043.80	PetroVietnam Power Corporation	10550.00	8398.89	25.6%	113669.92

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