

# Daily Market Report

## 15 July 2021

### JSE

JSE All-Share Index rose 1.21% to close at 67,897.63 points on Wednesday, as all the sectors recorded gains.

### BRVM

BRVM Composite Index closed at 161.11 points, up by 0.97% on Wednesday with Crown Siem Côte d'Ivoire and Sior Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share inched up 0.04% to close at 37,872.55 points on Wednesday, as the Consumer Goods and Oil & Gas sectors recorded gains.

### EGX

EGX 30 Index advanced by 1.63% and closed at 10,602.41 points on Wednesday, as the market gained LE 9.23 billion of market cap, amid Arab buying.

### ESG

Casablanca ESG 10 Index closed at 912.84 points on Wednesday, as it fell 0.56%.

## African Markets

**Nigeria:** NSE 30 Index inched up by 0.004% and closed at 1,613.85 points on Wednesday. Total and Fidelity were the top gainers.

**Egypt:** EGX 30 Index advanced by 1.63% and closed at 10,602.41 points on Wednesday, as the market gained LE 9.23 billion of market cap, amid Arab buying.

**Kenya:** NSE 20 Index increased by 0.11% and closed at 1,955.47 points on Wednesday. Diamond Trust Bank and Safaricom were the top gainers.

**South Africa:** JSE Top 40 Index jumped 1.33% to close at 61,753.54 points on Wednesday, as all the sectors recorded gains.

## Capital Markets

**JSE** Johannesburg Stock Exchange ▲ 1.21%

**BRVM** Bourse Régionale des Valeurs Mobilières ▲ 0.97%

**NSE** Nigerian Stock Exchange ▲ 0.04%

**EGX** Egyptian Stock Exchange ▲ 1.63%

**ESG** Casablanca Stock Exchange ▼ 0.56%

## Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.13
INTERBANK RATES	
OBB	14.00 ▼
Overnight	14.50 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.47% to close at 7,079.50 points on Wednesday, as First Abu Dhabi Bank and International Holding Company recorded gains. MSCI UAE Index increased marginally by 0.05% to close at 383.99 points.

**Vietnam:** VN-30 Index dropped by 2.12% to close at 1,410.30 points on Wednesday, as the blue chip companies recorded losses. MSCI Vietnam declined by 0.23% to close at 975.68 points.

**Saudi Arabia:** Tadawul All Share Index was up by 0.39% to close at 10,778.07 points on Wednesday, as gains in the Transport, Real Estate Development and Energy & Utilities sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 0.36% to close at 1,437.19 points.

**India:** Nifty 50 increased by 0.26% to close at 15,853.95 points on Wednesday as gains in the IT, Technology and Capital Goods sectors pushed the shares higher. MSCI India Index increased by 0.21% to close at 1,834.58.

## News

### Nigeria:

Tax credit: FEC awards N309.9bn road contracts to Dangote  
Banks' total assets rise by N6.97tn in one year  
Debt servicing rises, gulps 72% of FG revenues

### Kenya:

Kenya's FDI falls Sh41bn on Covid, ownership rules  
Kenya Mortgage Refinance Co to Issue Housing Bond by End of 2021  
Locals buy Sh11bn more KCB stake

### Abu Dhabi:

UAE's ADNOC invests over \$750m in drilling services to boost oil production  
Satellite Operator Yahsat Jumps on Debut, Boosting Abu Dhabi IPO Push  
Abu Dhabi court orders NMC to pay 75% of Dubai Islamic Bank's legal costs

### Saudi Arabia:

Saudi telecom regulator issues two new MVNO licenses  
Saudi SRMG subsidiary acquires 51% of Thmanyah Publishing for \$88m  
Saudi Arabia marks privatization milestone with \$800m flour mill deals

### Egypt:

Egypt, UN launch national consultation meetings on strategic partnership  
Egypt's cement industry to cut production from 15 July  
Egypt facilitates oil exploration for Apache as it expands investment

### South Africa:

Rand, bonds under pressure amid violence  
Investec launches business account to attract mid-sized SA firms  
SA mining production in May rose sharply following record in April

### India:

Infosys Q1 Net profit rises 2% QoQ to Rs 5,195 cr; firm signs large deals  
Adani Green gets shareholder nod to raise borrowing limit to Rs 25K cr  
RBI restricts Mastercard from onboarding new customers in India

### Vietnam:

Vinh Phuc posts decade-high economic growth in 1H21  
Việt Nam, Australia forge economic ties, towards sustainable recovery  
Aviation sector eyes recovery in 2023-24

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,079.50	0.5%	1.7%	3.6%	40.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,602.41	1.6%	4.1%	3.4%	-2.2%	EGP/USD	15.70	0.1%	-0.2%
India	15,853.95	0.3%	1.0%	0.8%	13.4%	INR/USD	74.59	0.1%	2.1%
Kenya	1,955.47	0.1%	0.2%	1.4%	4.7%	KES/USD	108.05	0.0%	-1.1%
Nigeria	1,613.85	0.004%	-0.4%	1.2%	-1.6%	NGN/USD	410.50	-0.3%	4.0%
Saudi Arabia	10,778.07	0.4%	-0.4%	-1.9%	24.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,753.54	1.3%	2.5%	2.6%	13.6%	ZAR/USD	14.58	-0.2%	-0.8%
Vietnam	1,410.30	-2.1%	-5.6%	-7.8%	31.7%	VND/USD	23,012.50	0.0%	-0.3%

## MSCI Emerging Markets

MSCI Frontier	632.03	0.2%	-0.6%	-2.2%	10.6%	Brent Crude (\$)	74.76	-2.3%	44.1%
MSCI Frontier 100	1,415.32	0.2%	-0.5%	-1.7%	12.5%	Gold (\$)	1,822.61	0.6%	-4.0%
MSCI Emerging	1,338.13	-0.1%	1.5%	-2.7%	3.6%	Copper (\$)	9,302.55	-0.8%	20.0%
MSCI World (USD)	3,058.59	-0.02%	0.2%	1.4%	13.7%	Coffee (\$)	144.13	0.5%	20.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Total	168.00	6.1%	29.2%	42.60	Access	9.00	-2.2%	6.5%	259.58
P Z Cussons	5.80	1.8%	9.4%	9.87	Transnational Corporation	0.92	-2.1%	2.2%	5.06
Axamansard	0.88	1.1%	-16.2%	0.92	Sterling	1.56	-1.9%	-23.5%	5.54
UACN	10.00	1.0%	37.9%	8.56	Wema	0.80	-1.2%	15.9%	6.89
Fidelity	2.35	0.9%	-6.7%	8.22	Zenith	24.00	-1.2%	-3.2%	424.70
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	168.00	168.00	0.0%	42.60	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	81.93	UBN	5.60	4.65	20.4%	0.83
Okomu Oil	110.00	110.00	0.0%	0.04	Unilever	13.00	10.50	23.8%	6.25
Nestle	1540.00	1540.00	0.0%	4.27	Cap	19.00	15.25	24.6%	3.25
P Z Cussons	5.80	5.85	-0.9%	9.87	Ecobank	5.20	3.90	33.3%	11.77

### 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	1.95	14.7%	77.3%	1.20	Gulf Medical Projects	2.16	-10.0%	-10.0%	0.01
ALPHA DHABI HOLDING PJSC	23.60	4.5%	57.3%	103.71	Methaq Takaful Ins.	0.88	-9.7%	1.4%	9.03
National Corp for Tourism and Hotels	3.20	3.2%	76.8%	0.11	Abu Dhabi Ship Building	4.03	-5.0%	73.0%	1.50
Manazel PJSC	0.37	1.9%	5.4%	7.25	Sudatel Telecom	0.38	-4.8%	-8.4%	0.09
International Holding	128.90	1.9%	206.9%	348.02	Abu Dhabi National for Building Materials	0.29	-3.7%	12.0%	0.03
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	1.95	1.95	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 E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Fawry For Banking Technology And Electronic Payment	19.46	4.7%	-25.5%	55.03	MM Group For Industry And International Trade	7.15	-1.9%	-8.8%	13.17
GB AUTO	3.53	3.5%	6.3%	11.10	Oriental Weavers	7.97	-1.7%	16.4%	24.32
Eastern Company	11.88	3.5%	-8.9%	17.12	Orascom Financial Holding	0.29	-0.3%	-39.5%	10.14
T M G Holding	7.23	2.8%	10.0%	34.25	CI Capital Holding For Financial Investments	3.23	-0.3%	-19.0%	1.41
ELSWEDY ELECTRIC	8.50	2.8%	-13.4%	55.64	Six of October (SODIC)	17.13	-0.3%	15.4%	0.31
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£)
Sidi Kerir Petrochemicals	12.37	12.70	-2.6%	12.58	Citadel Capital - Common Shares	1.16	1.09	6.6%	15.17
Palm Hills Development Company	1.89	1.96	-3.5%	4.57	CI Capital Holding For Fin Investments	3.23	2.97	8.8%	1.37
Six of October Development & Investment (SODIC)	17.13	18.20	-5.9%	1.48	Credit Agricole Egypt	23.02	21.05	9.4%	8.65
Telecom Egypt	13.91	14.80	-6.0%	5.41	Heliopolis Housing	4.75	4.29	10.7%	4.27
T M G Holding	7.23	7.72	-6.3%	29.97	Ibnsina Pharma	3.68	3.32	10.8%	6.30

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Wipro	561.55	7.0%	45.4%	16170.500	Maruti Suzuki India	7325.00	-1.4%	-4.2%	3379.38
Tech Mahindra	1077.00	2.6%	10.7%	3401.65	Adani Ports And Sez.	696.70	-1.0%	44.0%	9692.63
Infosys	1577.40	2.1%	25.6%	8856.25	HUL	2412.50	-1.0%	0.7%	3329.57
Hcl Technologies	987.90	2.1%	4.4%	4309.37	Nestle India Limited	17525.00	-0.9%	-4.7%	892.71
Larsen & Toubro	1540.85	1.8%	19.7%	6167.41	Titan Company	1709.65	-0.9%	9.1%	1528.95
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bajaj Finserv	12980.00	13033.00	-0.4%	3112.95	Britannia Inds.	3487.25	3317.30	5.1%	1593.71
Wipro	561.55	564.00	-0.4%	16170.50	Hero Motocorp	2899.00	2604.00	11.3%	1247.18
SBI Life Insurance	1053.00	1060.85	-0.7%	1685.14	Reliance Industries	2083.55	1798.00	15.9%	8230.05
Infosys	1577.40	1591.00	-0.9%	8856.25	Nestle India Limited	17525.00	15100.00	16.1%	892.71
Divi's Laboratories Limited	4620.00	4661.65	-0.9%	1688.96	HUL	2412.50	2000.05	20.6%	3329.57

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Diamond Trust Bank Limited	63.50	6.7%	-15.3%	13.24	WPP Scangroup Plc	4.86	-2.8%	-19.0%	2.81
Safaricom Plc	41.75	1.3%	21.9%	251.04	Centum Investment Company Plc	16.80	-1.2%	4.7%	0.24
Kenya Power & Lighting Limited	1.40	0.7%	-18.1%	0.68	Nairobi Securities Exchange Plc	8.50	-0.9%	4.2%	0.13
Bamburi Cement Limited	37.15	0.4%	-1.8%	0.47	Kenya Reinsurance Corporation Ltd	2.50	-0.8%	7.8%	3.36
Equity Group Holdings Plc	48.10	0.2%	31.6%	13.69	The Cooperative Bank of Kenya Ltd	13.60	-0.7%	8.8%	0.73
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	48.10	49.45	-2.7%	13.69	WPP Scangroup Plc	4.86	4.80	1.3%	2.81
The Cooperative Bank of Kenya Ltd	13.60	14.05	-3.2%	0.73	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	1.77
East African Breweries Limited	187.50	194.00	-3.4%	8.36	Kengen Limited	4.00	3.90	2.6%	3.60
Safaricom Plc	41.75	43.45	-3.9%	251.04	Diamond Trust Bank Limited	63.50	57.50	10.4%	13.24
Nation Media Group	25.00	26.05	-4.0%	11.55	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)
Arriyadh Development Co.	27.30	9.9%	58.9%	455.13	Saudi Research and Marketing Group	155.00	-4.9%	97.5%	36.31
Raydan Food Co.	30.60	9.9%	-7.3%	156.55	Bupa Arabia for Coop Insurance Co.	130.60	-4.7%	6.9%	12.42
National Gas and Industrialization Co.	43.95	8.8%	44.1%	64.10	Musharaka REIT Fund	11.20	-3.6%	13.9%	10.22
Nama Chemicals Co.	48.90	5.6%	46.8%	96.97	Jarir Marketing Co.	199.40	-2.5%	15.0%	36.81
Saudi Industrial Services Co.	48.85	4.1%	50.8%	28.43	Abdullah Al Othaim Markets Co.	117.80	-2.5%	-4.1%	56.54
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	72.40	72.40	0.0%	133.55	Nt Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	42.05	42.05	0.0%	36.33	BinDawood Holding Co.	107.40	105.60	1.7%	10.58
Walaa Cooperative Insurance Co.	24.72	24.72	0.0%	26.67	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	39.20	39.20	0.0%	9.59	Saudi Airlines Catering Co.	75.70	70.50	7.4%	10.06
United Electronics Co.	135.00	135.00	0.0%	36.07	Savola Group	40.75	36.60	11.3%	34.11

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Mr Price Group	20672.00	4.5%	21.1%	37873.81	Redefine Properties	389.00	-4.0%	16.8%	5383.70
Sasol Limited	23252.00	3.9%	73.6%	34590.20	Investec Plc	5515.00	-2.4%	50.5%	6199.31
Sibanye Stillwater	6280.00	3.2%	4.7%	84652.19	Investec Ltd	5735.00	-2.4%	52.3%	8114.20
Woolworths Hdq.	5365.00	2.9%	35.7%	24560.40	Nepi Rockcastle	10275.00	-2.0%	9.9%	10464.93
Impala Platinum	25700.00	2.7%	27.3%	79188.52	Growthpoint Prop	1474.00	-1.5%	17.3%	22649.91
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)	39889.00	40333.00	-1.1%	13657.87	Prosus	137700.00	128906.00	6.8%	161163.73
Aspen PhmcR.Hdg.	17150.00	17366.00	-1.2%	19727.16	Vodacom Group	12883.00	12009.00	7.3%	14553.33
Nepi Rockcastle	10275.00	10700.00	-4.0%	10464.93	Naspers Ltd	288547.00	268500.00	7.5%	614998.76
Bid Corporation	32031.00	33389.00	-4.1%	46289.13	Spar Group	17844.00	16103.00	10.8%	12384.24
MTN Group	10432.00	10941.00	-4.7%	53541.59	Brit.Amer.Tobacco	56556.00	50757.00	11.4%	26211.97

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vincom Retail	28250.00	1.4%	-10.0%	123068.05	Techcombank	51000.00	-5.4%	61.9%	1743416.52
Khang Dien House Trading & Investment	36800.00	1.4%	1354.5%	107280.03	Tien Phong Commercial Joint Stock Bank	33000.00	-5.2%	-57.5%	176155.92
Masan Group Corp	116200.00	1.0%	30.7%	164937.60	Mobile World Inv.	166500.00	-4.9%	40.0%	232701.13
Vinamilk	85000.00	0.8%	-21.9%	354773.58	Sai Gon Thuong Tin Commercial	27400.00	-4.5%	62.1%	705739.89
Phat Dat Real Estate Development Corp	87500.00	0.6%	365.4%	190571.64	Vietnam Prosperity	61500.00	-3.9%	89.2%	1389796.61
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	116200.00	122500.00	-5.1%	175018.50	Vinamilk	85000.00	84200.00	1.0%	243062.19
Petrovietnam Gas	91300.00	97500.00	-6.4%	53188.95	Hoang Huy Investment Financial Services	19100.00	17314.95	10.3%	107750.78
Mobile World Inv. Corp	166500.00	179900.00	-7.4%	113995.00	Vincom Retail	28250.00	25050.00	12.8%	78431.17
Vinhomes	109500.00	120400.00	-9.1%	280593.75	Bank for Inv. and Devp	42600.00	34958.13	21.9%	84058.00
Phat Dat Real Estate Development Corp	87500.00	97500.00	-10.3%	236579.10	Vietjet Aviation	117000.00	94300.00	24.1%	65249.58

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