

Daily Market Report

16 July 2021

JSE

JSE All-Share Index fell 0.53% to close at 67,538.63 points on Thursday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 161.91 points, up by 0.50% on Thursday with Sogb Côte d'Ivoire and Sicom Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched down 0.01% to close at 37,866.90 points on Thursday, as the Consumer Goods sector recorded losses.

EGX

EGX 30 Index declined by 0.39% and closed at 10,561.28 points on Thursday, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 911.07 points on Thursday, as it declined by 0.19%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.53%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.50%
NSE Nigerian Stock Exchange	▼ 0.01%
EGX Egyptian Stock Exchange	▼ 0.39%
ESG Casablanca Stock Exchange	▼ 0.19%

African Markets

Nigeria: NSE 30 Index inched up by 0.04% and closed at 1,614.54 points on Thursday. Fidelity and Zenith were the top gainers.

Egypt: EGX 30 Index declined by 0.39% and closed at 10,561.28 points on Thursday, amid Egyptian selling.

Kenya: NSE 20 Index increased by 0.73% and closed at 1,969.79 points on Thursday. Kengen and Diamond Trust Bank and were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.51% to close at 61,439.11 points on Thursday, as all the sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.93%
Exchange Rate	₦ 410.13
INTERBANK RATES	
OBB	7.00 ▼
Overnight	7.25 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased by 0.15% to close at 7,068.98 points on Thursday, as First Abu Dhabi Bank and International Holding Company recorded losses. MSCI UAE Index declined by 0.33% to close at 382.73 points.

Vietnam: VN-30 Index climbed 1.42% to close at 1,430.29 points on Thursday, as the blue chip companies recorded gains. MSCI Vietnam rose 0.80% to close at 983.50 points.

Saudi Arabia: Tadawul All Share Index was up by 0.15% to close at 10,794.51 points on Thursday, as gains in the Agriculture & Food, Transport and Building & Construction sectors pushed the shares higher. MSCI Tadawul 30 Index inched up 0.01% to close at 1,437.29 points.

India: Nifty 50 increased by 0.44% to close at 15,924.20 points on Thursday, as gains in the Real Estate, Capital Goods and IT sectors pushed the shares higher. MSCI India Index increased by 0.32% to close at 1,840.54.

News

Nigeria:

Senate Okays FG's Request to Obtain \$8.325bn, €490m Loans
COVID-19: W'Bank mobilises \$100bn support fund for Nigeria, others
NCC to Auction 5G Spectrum in Q4 2021

Kenya:

Treasury exceeds July bond uptake target by Sh20bn
Kenyan marketing startup gets Sh108m in venture funding
Safaricom gets formal nod to start operations in Ethiopia

Abu Dhabi:

UAE reaches compromise to resolve standoff with OPEC+
Abu Dhabi-based Sarwa launches crypto portfolios to make trading accessible
ADNOC Dishes Out \$760MM+ in Awards

Saudi Arabia:

Saudi inflation rises again in June, hits highest rate this year
Saudi PIF, COSCO buy 21.2% stake in Red Sea Gateway Terminal
Saudi's largest container terminal RSGT completes \$280m stake sale

Egypt:

Alexandria Minerals Oil Co turns profitable in FY20/21
CIRA's profit rises 38% in nine months on higher revenue
Egypt, Kuwait discuss ways to strengthen bilateral relations in all fields

South Africa:

SA's largest refinery suspends operations
Insurance sector braces for billions of rand in Sasria riot claims
SA's banks close hundreds of branches to limit destruction

India:

Exports up 48.34% to \$32.5 bn; trade deficit at \$9.37 bn in June
Centre releases Rs 75,000 crore to states as GST compensation
AGR dues: Supreme Court to hear case on 19 July

Vietnam:

Vietnam Airlines to raise 349 million USD through share issuance
Two economic growth scenarios for 2021 announced
Exporters, hit by pandemic, turn to domestic market

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,068.98	-0.1%	1.5%	3.4%	40.1%	AED/USD	3.67	0.0%	0.0%
Egypt	10,561.28	-0.4%	3.7%	3.0%	-2.6%	EGP/USD	15.71	0.0%	-0.2%
India	15,924.20	0.4%	1.5%	1.3%	13.9%	INR/USD	74.55	-0.1%	2.0%
Kenya	1,969.79	0.7%	0.9%	2.2%	5.4%	KES/USD	108.20	0.1%	-0.9%
Nigeria	1,614.54	0.04%	-0.4%	1.2%	-1.6%	NGN/USD	411.50	0.2%	4.2%
Saudi Arabia	10,794.51	0.2%	-0.3%	-1.7%	24.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,439.11	-0.5%	2.0%	2.1%	13.0%	ZAR/USD	14.55	-0.2%	-1.0%
Vietnam	1,430.29	1.4%	-4.3%	-6.5%	33.6%	VND/USD	23,011.00	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	635.09	0.5%	-0.1%	-1.8%	11.1%	Brent Crude (\$)	73.47	-1.7%	41.6%
MSCI Frontier 100	1,423.20	0.6%	0.1%	-1.2%	13.1%	Gold (\$)	1,823.32	0.0%	-3.9%
MSCI Emerging	1,348.48	0.8%	2.3%	-1.9%	4.4%	Copper (\$)	9,452.00	1.6%	22.0%
MSCI World (USD)	3,043.52	-0.5%	-0.3%	0.9%	13.1%	Coffee (\$)	146.26	1.5%	22.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	0.95	3.3%	5.6%	8.74	Nigerian Breweries	58.00	-3.3%	3.6%	71.96
Fidelity	2.40	2.1%	-4.8%	32.16	Axamansard	0.87	-1.1%	-17.1%	4.28
Zenith	24.30	1.3%	-2.0%	86.09	Dangote Sugar	17.65	-1.1%	0.3%	14.92
FCMB	3.00	1.0%	-9.9%	2.39	FBNH	7.20	-0.7%	0.7%	18.17
United Capital PLC	6.30	1.0%	51.1%	15.73	Sterling	1.55	-0.6%	-24.0%	7.95
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Total	168.00	168.00	0.0%	1.84	Transcorp Hotels	3.57	3.25	9.8%	0.04
Seplat Petroleum	770.00	770.00	0.0%	52.80	UBN	5.60	4.65	20.4%	0.17
Okomu Oil	110.00	110.00	0.0%	3.59	Unilever	13.00	10.50	23.8%	3.09
Nestle	1540.00	1540.00	0.0%	4.14	Cap	19.00	15.25	24.6%	0.32
P Z Cussons	5.80	5.85	-0.9%	2.53	Ecobank	5.20	3.90	33.3%	0.33

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
REEM INVESTMENTS PrJSC	31.02	14.9%	41.0%	0.05	Methaq Takaful Ins.	0.83	-5.6%	-4.3%	13.38
Al Qudra Holding	2.24	14.9%	103.6%	4.32	Gulf Cement	0.76	-3.3%	-8.9%	0.00
RAK Co. for White Cement & Construction	0.93	7.6%	9.0%	0.00	AL YAH SATELLITE COMMUNICATIONS COMPANY	2.73	-2.5%	-0.7%	113.67
Abu Dhabi National for Building Materials	0.31	6.9%	19.7%	0.05	Gulf Pharmaceutical Ind.	1.73	-2.3%	30.1%	2.63
Abu Dhabi Ship Building	4.14	2.7%	77.7%	2.39	Agthia Group	6.17	-1.8%	45.2%	4.66
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	2.24	2.24	0.0%	4.32	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£)
Alexandria Mineral Oils Co	3.41	4.3%	9.3%	23.57	T M G Holding	7.05	-2.5%	7.3%	9.53
Cleopatra Hospital Company	4.56	0.9%	-4.2%	27.80	Export Development Bank of Egypt (EDBE)	10.58	-2.5%	-11.3%	2.82
Six of October Development & Investment (SODIC)	17.28	0.9%	16.4%	1.10	Fawry For Banking Technology And Electronic Payment	19.02	-2.3%	35.4%	36.72
Emaar Misr for Development	2.37	0.9%	0.0%	16.38	Ibnsina Pharma	3.62	-1.6%	-28.9%	6.93
Credit Agricole Egypt	23.21	0.8%	-20.0%	13.54	Oriental Weavers	7.85	-1.5%	14.6%	4.70
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£)
Telecom Egypt	13.84	13.84	0.0%	11.73	Edita Food Industries S.A.E	7.80	7.80	0.0%	6.17
Six of October Development & Investment (SODIC)	17.28	17.28	0.0%	1.10	Emaar Misr for Development	2.37	2.37	0.0%	16.38
Sidi Kerir Petrochemicals	12.20	12.20	0.0%	6.79	GB AUTO	3.53	3.53	0.0%	5.07
Pioneers Holding	4.33	4.33	0.0%	11.93	Medinet Nasr Housing	3.30	3.30	0.0%	5.03
Oriental Weavers	7.85	7.85	0.0%	4.70	Orascom Financial Holding	0.29	0.29	0.0%	10.63

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hcl Technologies	1039.05	5.0%	9.8%	13091.843	ONGC	117.10	-3.1%	25.8%	3350.40
Larsen & Toubro	1601.25	3.7%	24.4%	14556.87	Eicher Motors	2664.90	-1.3%	5.3%	1950.09
Wipro	578.35	3.0%	49.7%	17791.61	Bharti Airtel	525.45	-0.9%	3.1%	3563.34
Tech Mahindra	1109.25	2.9%	14.0%	6545.86	Grasim Industries	1554.60	-0.8%	67.5%	1418.49
Hindalco Industries	401.35	2.5%	66.8%	4118.17	Coal India	147.00	-0.8%	8.5%	1064.38
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Wipro	578.35	579.65	-0.2%	17791.61	Britannia Inds.	3459.95	3317.30	4.3%	917.25
Ultratech Cement	7193.00	7238.95	-0.6%	2097.71	Hero Motocorp	2888.00	2604.00	10.9%	1009.99
Tata Steel	1257.60	1265.80	-0.6%	12104.49	Reliance Industries	2080.75	1798.00	15.7%	9098.53
Tech Mahindra	1109.25	1119.70	-0.9%	6545.86	Nestle India Limited	17592.00	15100.00	16.5%	489.84
Divi's Laboratories Limited	4617.95	4661.65	-0.9%	1339.83	HUL	2411.95	2000.05	20.6%	1671.69

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	4.32	8.0%	-8.3%	1.49	Stanbic Holdings	81.00	-3.3%	-4.7%	0.18
Diamond Trust Bank Limited	65.00	2.4%	-13.3%	3.98	WPP Scangroup Plc	4.81	-1.0%	-19.8%	2.68
Safaricom Plc	42.60	2.0%	24.4%	159.93	Nairobi Securities Exchange Plc	8.44	-0.7%	3.4%	0.02
Bamburi Cement Limited	37.80	1.7%	-0.1%	0.74	Kenya Reinsurance Corporation Ltd	2.49	-0.4%	7.3%	0.45
Kenya Power & Lighting Limited	1.42	1.4%	-17.0%	0.27	The Cooperative Bank of Kenya Ltd	13.55	-0.4%	8.4%	0.84
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	48.55	49.45	-1.8%	4.99	WPP Scangroup Plc	4.81	4.80	0.2%	2.68
Safaricom Plc	42.60	43.45	-2.0%	159.93	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	5.32
East African Breweries Limited	188.25	194.00	-3.0%	0.58	Kengen Limited	4.32	3.90	10.8%	1.49
The Cooperative Bank of Kenya Ltd	13.55	14.05	-3.6%	0.84	Stanbic Holdings	81.00	72.25	12.1%	0.18
Nation Media Group	25.00	26.05	-4.0%	10.12	Diamond Trust Bank Limited	65.00	57.50	13.0%	3.98

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.	28.80	5.5%	67.6%	372.22	Wataniya Insurance	49.50	-6.4%	7.6%	49.80
Alkhorayef Water and Power Technologies Co.	128.00	4.1%	36.8%	616.09	Nama Chemicals	47.50	-2.9%	42.6%	64.39
Rabigh Refining and Petrochemical Co.	27.50	3.8%	99.0%	185.61	National Gas and Industrialization Co.	42.75	-2.7%	40.2%	30.72
Saudi Industrial Services Co.	50.40	3.2%	55.6%	304.40	Gulf General Coop Insurance Co.	19.00	-2.7%	-23.6%	25.93
Sahara International Petrochemical Co.	31.60	3.1%	82.4%	141.11	Abdullah Saad Mohammed Abo Moati for Bookstores Co.	51.50	-2.5%	-3.7%	71.44
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	71.60	71.60	0.0%	52.65	Nt Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	42.30	42.30	0.0%	79.31	BinDawood Holding Co.	107.80	105.60	2.1%	11.30
Wala Cooperative Insurance Co.	24.52	24.52	0.0%	17.25	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	135.00	135.00	0.0%	39.13	Saudi Airlines Catering Co.	76.00	70.50	7.8%	11.34
United Cooperative Assurance Co.	29.75	29.75	0.0%	27.78	Savola Group	41.00	36.60	12.0%	27.71

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	293700.00	1.8%	-2.7%	395527.26	Sasol Limited	21450.00	-7.7%	60.2%	61218.39
Old Mutual Limited	1311.00	0.7%	10.3%	12395.60	Standard Bank	12431.00	-2.8%	-2.2%	77195.99
Bid Corporation	32245.00	0.7%	22.6%	12343.45	Mr Price Group	20194.00	-2.3%	18.3%	10134.78
Vodacom Group	12955.00	0.6%	4.1%	9493.73	Bidvest Group	18280.00	-1.9%	16.4%	18170.96
Redefine Properties	391.00	0.5%	17.4%	7493.11	Nedbank Group	16216.00	-1.7%	25.2%	28649.00
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)
Aspen Phmc.Hdg.	17227.00	17421.00	-1.1%	14045.90	Prosus (JSE)	138266.00	128906.00	7.3%	114950.07
Mondi (JSE)	39560.00	40349.00	-2.0%	5383.60	Vodacom Group	12955.00	12009.00	7.9%	9493.73
Bid Corporation	32245.00	33389.00	-3.4%	12343.45	Naspers Ltd	293700.00	268500.00	9.4%	395527.26
Nepi Rockcastle	10296.00	10700.00	-3.8%	9843.09	Spar Group	17808.00	16103.00	10.6%	4316.66
MTN Group	10432.00	10941.00	-4.7%	53541.59	Brit.Amer.Tobacco	56498.00	50757.00	11.3%	27001.02

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	18700.00	6.9%	-10.7%	53334.87	Vietjet Aviation	114800.00	-1.9%	-8.2%	115998.21
Saigon Securities Inc	53700.00	5.3%	62.2%	709735.81	Khang Dien House Trading & Investment	36350.00	-1.2%	1336.8%	53799.58
Sai Gon Thuong Tin Commercial	28800.00	5.1%	70.4%	713464.60	Masan Group Corp	115000.00	-1.0%	29.4%	121396.52
Vietnam Prosperity	64000.00	4.1%	96.9%	1128177.57	Vingroup JSC	102000.00	-1.0%	-5.7%	264195.26
Vietnam JSC Bank	35000.00	3.9%	1.3%	521879.74	Phu Nhuan Jewelry	95100.00	-0.9%	17.4%	99104.14
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	115000.00	122500.00	-6.1%	121267.50	Vinamilk	85200.00	84200.00	1.2%	279805.32
Mobile World Inv. Corp	167100.00	179900.00	-7.1%	184495.11	Hoang Huy Investment Financial Services	19150.00	17314.95	10.6%	71638.24
Petrovietnam Gas	90500.00	97500.00	-7.2%	44707.00	Vincom Retail	28000.00	25050.00	11.8%	103216.40
Vinhomes	110300.00	120400.00	-8.4%	502504.74	Vietjet Aviation	114800.00	94300.00	21.7%	118886.88
Saigon Securities Inc	53700.00	59000.00	-9.0%	730959.03	Bank for Inv. and Devp	42700.00	34958.13	22.1%	76569.64

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