

Daily Market Report

19 July 2021

JSE

JSE All-Share Index fell 1.49% to close at 66,529.50 points on Friday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 161.52 points, down by 0.24% on Friday with Sogb Côte d'Ivoire and BICI Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 0.21% to close at 37,947.18 points on Friday, as the Banking, Oil & Gas and Industrial sectors recorded gains.

EGX

EGX 30 Index increased by 0.81% and closed at 10,646.85 points on Sunday, as the market gained LE 5.73 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index closed at 913.59 points on Friday, as it increased by 0.28%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 1.49%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.24%
NSE Nigerian Stock Exchange	▲ 0.21%
EGX Egyptian Stock Exchange	▲ 0.81%
ESG Casablanca Stock Exchange	▲ 0.28%

African Markets

Nigeria: NSE 30 Index increased by 0.20% and closed at 1,617.76 points on Friday. United Capital and Access were the top gainers.

Egypt: EGX 30 Index increased by 0.81% and closed at 10,646.85 points on Sunday, as the market gained LE 5.73 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index increased by 0.13% and closed at 1,972.33 points on Friday. Nairobi Securities Exchange and Stanbic Holdings were the top gainers.

South Africa: JSE Top 40 Index decreased by 1.63% to close at 60,437.58 points on Friday, as all the sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.13
INTERBANK RATES	
OBB	4.50 ▼
Overnight	4.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased marginally by 0.05% to close at 7,065.13 points on Sunday, as Aldar Properties and Arkan Building Materials Company recorded losses. MSCI UAE Index remained unchanged at 382.73 points.

Vietnam: VN-30 Index increased by 0.54% to close at 1,438.05 points on Friday, as the blue chip companies recorded gains. MSCI Vietnam rose 1.07% to close at 994.01 points.

Saudi Arabia: Tadawul All Share Index was closed on Sunday on account of Eid-al-Adha.

India: Nifty 50 inched down 0.01% to close at 15,923.40 points on Friday, as losses in the IT, Technology and Banking sectors pushed the shares lower. MSCI India Index marginally increased 0.05% to close at 1,841.41.

News

Nigeria:

OPEC increases Nigeria output to 1,829,000mb/d from April 2022
Nigeria seeks \$1 bln for key gas pipeline as it awaits Chinese lending
Lagos to raise \$2bn on LCFC for agriculture

Kenya:

CBK Raises KSh 19.2 Billion at Weekly T-Bills Auction
Standard Bank to Acquire Liberty Holdings at \$729 Million
Lenders snub SME loan seekers on Covid jitters

Abu Dhabi:

OPEC+ agrees to boost oil output; UAE baseline increased
ADCB H1 net profit jumps 76% to Dh2.524b
Sharjah Islamic Bank's net profit up 15% in first half

Saudi Arabia:

Saudi finance ministry pays \$9.46bln of private sector dues in H1 2021
Saudi wealth fund PIF invests in British carmaker McLaren
Saudi Arabia reduces holdings of US treasuries in May

Egypt:

Egypt's inflation to hover around midpoint of target 7% in Q4 of 2022: CBE
Egypt's central bank issues LE 11B in T-bills Sunday
FRA approves "ABC" offer to buy "Bloom Egypt" by LE 6.7B

South Africa:

Economic growth forecasts lowered after looting in Gauteng and KZN
Construction and building material sales indicate strengthening economy
Retailers gearing up to reopen stores after unrest

India:

HDFC Bank net profit rises 16% to Rs 7,729 crore
Reliance Retail buys Just Dial for Rs 5,710 crore
Paytm eyes largest Indian IPO to raise Rs 16,600 crore

Vietnam:

Vietnam expects to raise 120 trillion VND worth of G-bonds in Q3
Vietnam Airlines targets over 1.6 bln USD in revenue this year
PM approves new domestic trade strategy

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,065.13	-0.1%	-0.1%	3.4%	40.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,646.85	0.8%	0.8%	3.8%	-1.8%	EGP/USD	15.71	0.0%	-0.2%
India	15,923.40	-0.01%	0.0%	1.3%	13.9%	INR/USD	74.57	0.0%	2.1%
Kenya	1,972.33	0.1%	0.0%	2.3%	5.6%	KES/USD	108.20	0.0%	-0.9%
Nigeria	1,617.76	0.2%	0.0%	1.4%	-1.4%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	10,794.51	0.0%	0.0%	-1.7%	24.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,437.58	-1.6%	0.0%	0.5%	11.1%	ZAR/USD	14.42	-0.9%	-1.9%
Vietnam	1,438.05	0.5%	0.0%	-5.9%	34.3%	VND/USD	23,012.50	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	635.77	0.1%	0.0%	-1.7%	11.2%	Brent Crude (\$)	73.59	0.2%	41.8%
MSCI Frontier 100	1,423.95	0.1%	0.0%	-1.1%	13.2%	Gold (\$)	1,812.56	-0.6%	-4.5%
MSCI Emerging	1,340.08	-0.6%	0.0%	-2.5%	3.8%	Copper (\$)	9,391.25	-0.6%	21.2%
MSCI World (USD)	3,024.66	-0.6%	0.0%	0.2%	12.4%	Coffee (\$)	147.6	0.9%	23.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Cap	20.80	9.5%	4.0%	3.19	Transnational Corporation	0.92	-3.2%	2.2%	3.46
United Capital PLC	6.50	3.2%	55.9%	81.34	Dangote Sugar	17.45	-1.1%	-0.9%	18.45
Access	9.20	2.2%	8.9%	51.56	FCMB	2.99	-0.3%	-10.2%	9.07
UBA	7.75	2.0%	-10.4%	46.64	Lafarge Africa	21.65	-0.2%	2.9%	17.04
Ecobank	5.30	1.9%	-11.7%	11.58					
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%	2.05	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	6.83	UBN	5.60	4.65	20.4%	0.28
Okomu Oil	110.00	110.00	0.0%	5.19	Unilever	13.05	10.50	24.3%	6.36
Nestle	1540.00	1540.00	0.0%	13.53	Custodian	6.10	4.55	34.1%	0.24
P Z Cussons	5.80	5.85	-0.9%	12.90	Julius Berger	20.05	14.90	34.6%	0.33

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	2.57	14.7%	133.6%	4.67	Arkan Building Materials	1.26	-5.3%	43.2%	14.18
National Marine Dredging	10.82	4.2%	80.0%	22.18	Methaq Takaful Ins.	0.89	-4.9%	3.0%	13.90
Gulf Pharmaceutical Ind.	1.80	4.1%	35.3%	11.10	Abu Dhabi National for Building Materials	0.30	-4.8%	13.9%	0.03
Gulf Cement	0.78	2.1%	-7.0%	0.02	ESG Emirates Stallions Group	3.71	-2.1%	-10.8%	1.52
Sharjah Islamic Bank	1.51	2.0%	14.4%	0.73	Al Dar Properties	3.84	-1.3%	21.9%	223.18
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	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	2.57	2.57	0.0%	4.80	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 Company	3.62	6.2%	16.0%	28.78	Export Development Bank Fawry For Banking Technology And Electronic Payment	10.22	-3.4%	-28.6%	5.15
Pioneers Holding	4.45	2.8%	10.7%	17.98	GB AUTO	18.66	-1.9%	-28.6%	13.53
Ibnsina Pharma	3.72	2.8%	-26.9%	13.29	Orascom Development	3.47	-1.7%	4.5%	3.11
Credit Agricole Egypt	23.82	2.6%	-17.9%	12.09	Edita Food Industries S.A.E	5.35	-1.5%	9.2%	1.50
Oriental Weavers	8.03	2.3%	17.2%	11.84		7.70	-1.3%	-13.5%	0.23
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	12.45	12.70	-2.0%	15.72	Citadel Capital - Common Shares	1.17	1.09	7.3%	5.24
Alexandria Mineral Oils Company	3.62	3.72	-2.7%	28.75	CI Capital Holding For Fin Investments	3.22	2.97	8.4%	2.37
Palm Hills Development Company	1.87	1.96	-4.5%	2.25	Orascom Financial Holding	0.29	0.26	10.8%	4.30
Six of October Development & Investment (SODIC)	17.31	18.20	-4.9%	0.33	Edita Food Industries S.A.E	7.70	6.93	11.1%	0.23
Telecom Egypt	13.91	14.80	-6.0%	3.90	Heliopolis Housing	4.78	4.29	11.4%	7.87

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Divi's Laboratories Limited	4766.55	3.5%	24.1%	5479.423	Hcl Technologies	1006.00	-3.3%	6.3%	8763.75
Bharti Airtel	540.95	3.0%	6.1%	5940.79	Eicher Motors	2619.10	-1.8%	3.5%	2724.18
Ultratech Cement	7320.15	1.8%	38.4%	3177.43	Infosys	1556.75	-1.5%	24.0%	9775.33
Tata Steel	1274.75	1.5%	98.1%	10799.42	Bajaj Finserv	12766.25	-1.5%	43.3%	3248.28
Power Grid Corp Of India	233.50	1.4%	23.0%	2084.30	Adani Ports And Sez.	689.00	-1.4%	42.4%	4803.48
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	4766.55	4772.00	-0.1%	5479.42	Britannia Inds.	3444.00	3317.30	3.8%	1375.85
Larsen & Toubro	1617.00	1625.00	-0.5%	6701.54	Hero Motocorp	2901.00	2606.15	11.3%	1330.85
Tata Steel	1274.75	1281.30	-0.5%	10799.42	Nestle India Limited	17615.10	15100.00	16.7%	647.81
Ultratech Cement	7320.15	7360.00	-0.5%	3177.43	Reliance Industries	2110.00	1798.00	17.4%	8574.53
Grasim Industries	1569.90	1582.15	-0.8%	1327.39	HUL	2417.95	2000.05	20.9%	1318.41

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	8.82	4.5%	8.1%	0.09	WPP Scangroup Plc	4.60	-4.4%	-23.3%	1.65
Stanbic Holdings	82.75	2.2%	-2.6%	0.05	Total Kenya Ltd	24.00	-4.0%	0.0%	0.01
Diamond Trust Bank Limited	66.25	1.9%	-11.7%	9.80	British American Tobacco Kenya Ltd	438.25	-1.5%	21.4%	0.22
Kengen Limited	4.38	1.4%	-7.0%	1.20	Kenya Power & Lighting Limited	1.41	-0.7%	-17.5%	0.29
Bamburi Cement Limited	38.25	1.2%	1.1%	0.50	East African Breweries Limited	187.00	-0.7%	21.2%	0.64
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%	68.51	WPP Scangroup Plc	4.60	4.52	1.8%	1.65
Safaricom Plc	42.60	43.45	-2.0%	321.79	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	1.30
East African Breweries Limited	187.00	194.00	-3.6%	0.64	Kengen Limited	4.38	3.90	12.3%	1.20
The Cooperative Bank of Kenya Ltd	13.50	14.05	-3.9%	8.08	Total Kenya Ltd	24.00	21.00	14.3%	0.01
Nation Media Group	25.00	26.05	-4.0%	0.83	Stanbic Holdings	82.75	72.25	14.5%	0.05

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	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	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

*Market closed on 18/7

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Redefine Properties	400.00	2.3%	20.1%	3371.10	Impala Platinum	24031.00	-5.0%	19.0%	52263.84
RMB Holdings Ltd	144.00	1.4%	73.2%	179.64	Northam Platinum	22083.00	-5.0%	5.4%	19843.96
Shoprite Limited	15778.00	1.3%	12.7%	22757.73	Anglo American Platinum	168283.00	-4.6%	16.6%	34627.09
Sanlam Limited	5936.00	0.5%	1.0%	31649.23	Anglo American	57203.00	-4.4%	18.4%	79509.82
Naspers Ltd	295146.00	0.5%	-2.2%	309287.92	Sibanye Stillwater	5967.00	-3.5%	-0.6%	59556.46
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 PhmcR.Hdg.	17086.00	17421.00	-1.9%	13179.10	Prosus	138350.00	128906.00	7.3%	82277.85
Mondi	39057.00	40349.00	-3.2%	13310.35	Vodacom Group	12947.00	12020.00	7.7%	15687.62
Shoprite Limited	15778.00	16384.00	-3.7%	22757.73	Naspers Ltd	295146.00	268500.00	9.9%	309287.92
MTN Group	10533.00	10941.00	-3.7%	49012.39	Spar Group	17856.00	16103.00	10.9%	7220.09
RMB Holdings Ltd	144.00	151.00	-4.6%	179.64	Brit.Amer.Tobacco	56646.00	50757.00	11.6%	37633.79

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Masan Group Corp	120500.00	4.8%	35.5%	235.605.66	Saigon Securities	52800.00	-1.7%	59.5%	576.044.94
Vingroup JSC	105800.00	3.7%	-2.2%	226.841.33	Sai Gon Thuong Tin Commercial	28450.00	-1.2%	68.3%	560609.04
Phat Dat Real Estate Development Corp	90200.00	3.4%	379.8%	604.485.06	Vinhomes	109000.00	-1.2%	21.8%	232.160.39
Khang Dien House Trading & Investment	36950.00	1.7%	1360.5%	51.545.02	Vincom Retail	27700.00	-1.1%	-11.8%	79481.89
FPT Corp	86800.00	1.6%	46.9%	197,405.90	Vietnam JSC Bank	34650.00	-1.0%	0.3%	338339.89
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	36950.00	38100.00	-3.0%	51748.48	Vinamilk	85900.00	84200.00	2.0%	124520.64
Mobile World Inv. Corp	168100.00	179900.00	-6.6%	114207.14	Vincom Retail	27700.00	25050.00	10.6%	78756.64
Phat Dat Real Estate Development Corp	90200.00	97500.00	-7.5%	605855.36	Hoang Huy Investment Fin Svs	19200.00	17314.95	10.9%	78848.64
Petrovietnam Gas	90000.00	97500.00	-7.7%	25110.00	Bank for Inv. and Devp	42500.00	34958.13	21.6%	60197.00
FPT Corp	86800.00	95000.00	-8.6%	198398.76	Vietjet Aviation	115400.00	94300.00	22.4%	76994.88

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