

Daily Market Report

22 July 2021

JSE

JSE All-Share Index rose 1.27% to close at 66,558.44 points on Wednesday, as all the sectors recorded gains.

BRVM

BRVM Composite Index closed at 166.01 points, up by 0.53% on Wednesday with Nestle Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NSE All-Share was closed on Wednesday on account of Eid el-Kabir.

EGX

EGX 30 Index was closed on Wednesday on account of Eid-al-Adha.

ESG

Casablanca ESG 10 Index closed at 907.14 points on Wednesday, as it declined by 0.37%.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.27%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.53%
NSE Nigerian Stock Exchange	↔ 0.00%
EGX Egyptian Stock Exchange	↔ 0.00%
ESG Casablanca Stock Exchange	▼ 0.37%

African Markets

Nigeria: NSE 30 Index was closed on Wednesday on account of Eid el-Kabir.

Egypt: EGX 30 Index was closed on Wednesday on account of Eid-al-Adha.

Kenya: NSE 20 Index inched up by 0.02% and closed at 1,985.36 points on Monday. Stanbic Holdings and Nairobi Securities Exchange were the top gainers.

South Africa: JSE Top 40 Index increased by 1.40% to close at 60,502.39 points on Wednesday, as all the sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.13
INTERBANK RATES	
OBB	11.00 ↔
Overnight	11.50 ↔

Other Emerging Markets

Abu Dhabi: ADX General was closed on Wednesday on account of Eid-al-Adha.

Vietnam: VN-30 Index declined by 0.32% to close at 1,406.54 points on Wednesday, as the blue chip companies recorded losses. MSCI Vietnam decreased by 0.16% to close at 982.66 points.

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

India: Nifty 50 was closed on Wednesday on account of Bakri Id.

News

Nigeria:

FG to boost trade export with N50bn funding
Despite aggressive revenue drive, FG suffers N1.4tn shortfall
Oil price rises to \$72 after hitting record low

Kenya:

Banks Restructure Loans to Enterprises worth KSh 234.7 bn
Bond turnover at NSE rises 59pc in first half
Kenya to gain from Sh10bn EU geothermal power fund

Abu Dhabi:

UAE's 1H21 bank results point to economic recovery gaining traction
Dubai Next offers strong platform to entrepreneurs
Mubadala gets preferential status in bid for Renova's assets

Saudi Arabia:

China's oil imports from Saudi Arabia fall 19% in June, remains top supplier
Saudi Arabia's holding of US bonds amounted to \$127.3bln in May
Saudi investment funds record 11% higher assets in Q1

Egypt:

Egypt's Central Bank issues guiding principles for sustainable financing
Egypt, Singapore discuss strengthening CIT cooperation
Egypt's non-oil exports hit \$15.37bln in 6 months

South Africa:

Consumer inflation eases to 4.9% after 30-month high of 5.2%
Pfizer/BioNTech to produce Covid-19 vaccine in SA
SA economy set to take R50bn hit from riots

India:

Govt plans to offload 7.93% stake in ITC to meet disinvestment target
Byju's acquires US kids' reading co for \$500mn
Policybazaar plans IPO to raise up to Rs 6,500 crore

Vietnam:

Govt rolls out interest-free loans for companies to pay salaries
Techcombank posts sector-leading CASA ratio in H1
Vietnamese firms urged to file for IP protection in foreign markets

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,065.13	0.0%	-0.1%	3.4%	40.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,646.85	0.0%	0.8%	3.8%	-1.8%	EGP/USD	15.67	0.0%	-0.4%
India	15,632.10	0.0%	-1.8%	-0.6%	11.8%	INR/USD	74.62	0.0%	2.1%
Kenya	1,985.36	0.02%	0.7%	3.0%	6.3%	KES/USD	108.20	0.0%	-0.9%
Nigeria	1,617.98	0.0%	0.0%	1.4%	-1.3%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	10,794.51	0.0%	0.0%	-1.7%	24.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,502.39	1.4%	0.1%	0.6%	11.3%	ZAR/USD	14.65	-0.1%	-0.3%
Vietnam	1,406.54	-0.3%	-2.2%	-8.0%	31.4%	VND/USD	23,024.00	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	629.44	0.2%	-1.0%	-2.6%	10.1%	Brent Crude (\$)	72.23	4.2%	39.2%
MSCI Frontier 100	1,416.22	0.1%	-0.5%	-1.7%	12.6%	Gold (\$)	1,802.65	-0.4%	-5.0%
MSCI Emerging	1,312.15	0.1%	-2.1%	-4.5%	1.6%	Copper (\$)	9,318.00	0.2%	20.2%
MSCI World (USD)	3,036.72	1.0%	0.4%	0.6%	12.9%	Coffee (\$)	149	3.1%	25.0%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.87	8.7%	26.1%	15.80	Ecobank	5.10	-3.8%	-15.0%	6.28
United Capital PLC	6.72	3.4%	61.2%	26.47	Sterling	1.51	-3.2%	-26.0%	119.55
Presco	70.00	2.9%	-1.3%	24.02	UBN	5.45	-2.7%	1.9%	5.77
Axamansard	0.89	2.3%	-15.2%	0.71	FBNH	7.25	-0.7%	1.4%	31.26
Transnational Corporation	0.94	2.2%	4.4%	3.85					
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%	10.70	Transcorp Hotels	3.57	3.25	9.8%	0.05
Seplat Petroleum	770.00	770.00	0.0%	0.53	UBN	5.45	4.65	17.2%	5.77
Okomu Oil	110.00	110.00	0.0%	1.04	Unilever	13.05	10.50	24.3%	3.83
Nestle	1540.00	1540.00	0.0%	2.43	Ecobank	5.10	3.90	30.8%	6.28
United Capital PLC	6.72	6.72	0.0%	26.47	Sterling	1.51	1.13	33.6%	119.55

*Market closed on 21/7

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

*Market closed on 21/7

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	10.22	-3.4%	-28.6%	5.15
Pioneers Holding	4.45	2.8%	10.7%	17.98	Fawry For Banking Tech & Electric Pay	18.66	-1.9%	-28.6%	13.53
Ibnsina Pharma	3.72	2.8%	-26.9%	13.29	GB AUTO	3.47	-1.7%	4.5%	3.11
Credit Agricole Egypt	23.82	2.6%	-17.9%	12.09	Orascom Development	5.35	-1.5%	9.2%	1.50
Oriental Weavers	8.03	2.3%	17.2%	11.84	Edita Food Industries S.A.E	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	1.87	1.96	-4.5%	2.25	Orascom Financial	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

*Market closed on 21/7

India*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Asian Paints	3145.05	5.5%	13.8%	20879.785	Hindalco Industries	382.20	-3.7%	58.9%	3555.44
Ultratech Cement	7441.95	1.8%	40.7%	7094.29	Indusind Bank	983.45	-3.2%	9.9%	3722.29
HUL	2432.00	1.0%	1.5%	2586.13	Tata Steel	1231.95	-2.7%	91.4%	10654.23
Maruti Suzuki India	7220.00	0.8%	-5.6%	2980.92	NTPC	118.25	-2.6%	19.0%	1355.67
Grasim Industries	1570.00	0.7%	69.2%	2709.46	Bharti Airtel	525.30	-2.4%	3.1%	3957.60
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	4798.85	4848.00	-1.0%	1735.59	Britannia Inds.	3434.90	3317.30	3.5%	526.57
Asian Paints	3145.05	3179.50	-1.1%	20879.78	Hero Motocorp	2843.00	2620.75	8.5%	1371.99
Grasim Industries	1570.00	1587.55	-1.1%	2709.46	Reliance Industries	2089.95	1830.00	14.2%	6524.71
Ultratech Cement	7441.95	7544.00	-1.4%	7094.29	Nestle India Limited	17860.00	15100.00	18.3%	794.55
NTPC	118.25	122.00	-3.1%	1355.67	HDFC Life Insurance Company	663.10	555.95	19.3%	2434.86

*Market closed on 21/7

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	84.75	2.4%	-0.3%	0.31	East African Breweries Limited	183.00	-2.5%	18.6%	2.38
Nairobi Securities Exchange Plc	8.98	1.8%	10.0%	0.09	Total Kenya Ltd	24.10	-2.0%	0.4%	0.20
NCBA Group Plc	26.00	1.4%	-2.8%	0.61	WPP Scangroup Plc	4.84	-2.0%	-19.3%	1.51
Bamburi Cement Limited	39.00	1.3%	3.0%	2.50	The Cooperative Bank of Kenya Ltd	13.20	-1.9%	5.6%	1.60
Safaricom Plc	42.80	0.5%	25.0%	349.22	Diamond Trust Bank Limited	68.50	-0.7%	-8.7%	29.10
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)
Safaricom Plc	42.80	43.45	-1.5%	349.22	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	3.44
Equity Group Holdings Plc	48.30	49.45	-2.3%	120.02	WPP Scangroup Plc	4.84	4.52	7.1%	1.51
Nation Media Group	25.00	26.05	-4.0%	1.65	Kengen Limited	4.34	3.90	11.3%	0.64
KCB Group Plc	44.75	47.00	-4.8%	84.31	Total Kenya Ltd	24.10	21.00	14.8%	0.20
East African Breweries Limited	183.00	194.00	-5.7%	2.38	Stanbic Holdings	84.75	72.25	17.3%	0.31

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 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
Walaa 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 21/7

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American (JSE)	57921.00	3.4%	19.9%	53951.15	Anglogold Ashanti	28410.00	-1.7%	-17.1%	23033.12
Sibanye Stillwater	5864.00	3.0%	-2.3%	63522.88	Gold Fields	13537.00	-1.7%	-1.6%	17279.24
Investec Plc	5319.00	2.2%	45.2%	6662.94	RMB Holdings Ltd	140.00	-1.4%	68.4%	130.13
Investec Ltd (JSE)	5530.00	1.9%	46.9%	13357.67	Aspen Phmc.Hdg.	16716.00	-1.0%	33.3%	10170.10
Naspers Ltd	295580.00	1.7%	-2.1%	331364.69	MTN Group	10403.00	-0.5%	72.8%	33831.99
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)	39199.00	40349.00	-2.9%	8657.45	Vodacom Group	12915.00	12020.00	7.4%	12424.00
Aspen Phmc.Hdg.	16716.00	17421.00	-4.0%	10170.10	Prosus (JSE)	138508.00	128906.00	7.4%	102035.24
MTN Group	10403.00	10941.00	-4.9%	33831.99	Brit.Amer.Tobacco (JSE)	55194.00	50757.00	8.7%	41397.93
Shoprite Limited	15523.00	16384.00	-5.3%	10554.06	Spar Group	17555.00	16103.00	9.0%	5857.02
Bidvest Group	19000.00	20178.00	-5.8%	15648.23	Naspers Ltd	295580.00	268500.00	10.1%	331364.69

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vincom Retail	27400.00	2.6%	-12.7%	151682.62	Ho Chi Minh City Devp	32200.00	-3.6%	35.6%	85787.73
Techcombank	50300.00	1.6%	59.7%	943702.77	Saigon Securities Inc	51500.00	-2.3%	55.6%	495722.24
Vietnam National Petroleum Group	50000.00	1.3%	-8.4%	56708.91	Petrovietnam Gas	87400.00	-1.8%	0.9%	49906.63
Vinhomes	108000.00	1.3%	20.7%	328336.72	Phat Dat Real Estate Development Corp	88400.00	-1.7%	370.2%	176263.79
Vingroup JSC	104000.00	1.0%	-3.9%	288244.22	Vietnam JSC Bank	32850.00	-1.2%	-4.9%	330972.69
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	36650.00	39500.00	-7.2%	62634.85	Vinamilk	85300.00	84000.00	1.5%	144685.86
FPT Corp	86600.00	95000.00	-8.8%	291772.72	Hoang Huy Investment Financial Services	18900.00	17314.95	9.2%	209117.16
Mobile World Inv. Corp	163400.00	179900.00	-9.2%	85000.68	Vincom Retail	27400.00	25050.00	9.4%	152439.90
Phat Dat Real Estate Development Corp	88400.00	97500.00	-9.3%	175562.40	Bank for Inv. and Devp	40700.00	34958.13	16.4%	47118.39
Vinhomes	108000.00	120400.00	-10.3%	328536.00	Vietjet Aviation	114000.00	94300.00	20.9%	58596.00

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