

# Daily Market Report

## 26 July 2021

### JSE

JSE All-Share Index rose 0.98% to close at 68,063.69 points on Friday, as all the sectors recorded gains.

### BRVM

BRVM Composite Index closed at 167.24 points, up by 0.34% on Friday with Safca Côte d'Ivoire and Saph Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share increased by 0.21% to close at 38,667.90 points on Friday, as the Industrial, Oil & Gas, Banking and Consumer Goods sectors recorded gains.

### EGX

EGX 30 Index increased by 0.93% and closed at 10,745.69 points on Sunday, as the market gained LE 8.79 billion of market cap, amid Egyptian buying.

### ESG

Casablanca ESG 10 Index closed at 914.48 points on Friday, as it rose 0.81%.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 0.98%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.34%
<b>NSE</b> Nigerian Stock Exchange	▲ 0.21%
<b>EGX</b> Egyptian Stock Exchange	▲ 0.93%
<b>ESG</b> Casablanca Stock Exchange	▲ 0.81%

### African Markets

**Nigeria:** NSE 30 Index increased by 0.20% and closed at 1,649.09 points on Friday. Total and Guinness were the top gainers.

**Egypt:** EGX 30 Index increased by 0.93% and closed at 10,745.69 points on Sunday, as the market gained LE 8.79 billion of market cap, amid Egyptian buying.

**Kenya:** NSE 20 Index increased by 0.15% and closed at 1,981.91 points on Friday. Nairobi Securities Exchange and NCBA Group were the top gainers.

**South Africa:** JSE Top 40 Index increased by 1.02% to close at 61,932.98 points on Friday, as all the sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.14
<b>INTERBANK RATES</b>	
OBB	27.50 ▲
Overnight	28.75 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.58% to close at 7,105.76 points on Sunday, as First Abu Dhabi Bank and Alpha Dhabi Holding recorded gains. MSCI UAE Index remained unchanged at 382.73 points.

**Vietnam:** VN-30 Index fell 1.89% to close at 1,401.53 points on Friday, as the blue chip companies recorded losses. MSCI Vietnam decreased by 1.93% to close at 978.56 points.

**Saudi Arabia:** Tadawul All Share Index rose 0.76% to close at 10,876.36 points on Sunday, as gains in Media, Utilities, Pharma and Capital Goods sector pushed the shares higher. MSCI Tadawul 30 Index increased by 0.52% to close at 1,444.72 points.

**India:** Nifty 50 increased by 0.20% to close at 15,856.05 points on Friday, as gains in the Real Estate, Banking and Fast Moving Consumer Goods sectors pushed the shares higher. MSCI India rose 0.13% to close at 1,844.12 points.

### News

#### Nigeria:

Expert expects unchanged rates as CBN holds MPC  
FG to service debt with N14.6tn in three years  
FG extends NIN-SIM linkage to Oct, 59.8 million enrolled

#### Kenya:

Mortgage defaults hit Sh70bn, auctions jump  
Pressure on banks to loan private sector as cash piles  
Sugar imports up 9pc in May on increased demand

#### Abu Dhabi:

Abu Dhabi reduces business setup, licence renewal fees to Dh1,000  
UAE's recovery to gain momentum in H2 as Expo Dubai boosts activity  
Demand, rent for Abu Dhabi's Grade A offices increased in Q2

#### Saudi Arabia:

Yansab announces reopening of factories  
\$9.3m invested in confectionery industry in Saudi Arabia  
Chemanol turns profitable in H1

#### Egypt:

Egypt's central bank issues LE 22B in T-bills, bonds Sunday  
Egypt succeeded in increasing state revenues by LE 119B: Maait  
Germany provides Egypt with €41 mln to support education sector

#### South Africa:

SA announces post-riot relief, eases virus lockdown  
SA Reserve Bank adopts cautious stance and maintains its 4.2% growth forecast  
Value of merger and acquisition deals in SA leap 958% in first half

#### India:

ICICI Bank Q1 results: Net profit rises 78% to Rs 4,616 cr as provisions fall  
RIL Q1 results: Net profit falls 7% YoY to ₹12,273 cr  
ITC standalone net in Q1 rises 28.6% to Rs 3013.4 cr

#### Vietnam:

Domestic trade to make up 15 percent of GDP by 2030  
US removes tariff threats against Vietnam  
Trade development programme in remote, mountainous areas approved

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,105.76	0.6%	0.6%	4.0%	40.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,745.69	0.9%	0.9%	4.8%	-0.9%	EGP/USD	15.67	0.0%	-0.4%
India	15,856.05	0.2%	0.0%	0.9%	13.4%	INR/USD	74.41	-0.1%	1.8%
Kenya	1,981.91	0.1%	0.0%	2.8%	6.1%	KES/USD	108.30	0.1%	-0.8%
Nigeria	1,649.09	0.2%	0.0%	3.4%	0.5%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	10,876.36	0.8%	0.8%	-1.0%	25.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,932.98	1.0%	0.0%	2.9%	13.9%	ZAR/USD	14.80	0.8%	0.7%
Vietnam	1,401.53	-1.9%	0.0%	-8.3%	30.9%	VND/USD	23,007.00	0.0%	-0.3%

## MSCI Emerging Markets

MSCI Frontier	630.32	-0.4%	0.0%	-2.5%	10.3%	Brent Crude (\$)	74.10	0.4%	43.3%
MSCI Frontier 100	1,417.92	-0.4%	0.0%	-1.5%	12.7%	Gold (\$)	1,805.90	-0.2%	-4.7%
MSCI Emerging	1,311.30	-1.1%	0.0%	-4.6%	1.6%	Copper (\$)	9,516.00	0.8%	22.5%
MSCI World (USD)	3,072.38	0.8%	0.0%	1.8%	14.2%	Coffee (\$)	149.00	0.0%	25.0%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Total	203.20	10.0%	56.3%	79.45	International Breweries	5.20	-2.8%	-12.6%	3.65
Guinness	31.65	9.1%	66.6%	25.72					
Unilever	14.30	8.7%	2.9%	50.82					
United Capital PLC	7.35	7.3%	76.3%	102.61					
Cadbury	9.00	4.7%	0.0%	21.85					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	10.50	10.50	0.0%	20.45	Transcorp Hotels	3.57	3.25	9.8%	0.00
Total	203.20	203.20	0.0%	79.45	UBN	5.45	4.65	17.2%	2.19
Seplat Petroleum	770.00	770.00	0.0%	85.71	Ecobank	5.10	3.90	30.8%	0.44
Okomu Oil	110.00	110.00	0.0%	8.23	Sterling	1.52	1.13	34.5%	3.31
Nestle	1540.00	1540.00	0.0%	149.56	Unilever	14.30	10.50	36.2%	50.82

### 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	35.66	15.0%	62.1%	0.03	RAK Co. for White Cement & Construction	0.86	-7.0%	1.3%	0.05
Al Qudra Holding	2.95	14.8%	168.2%	2.96	Methaq Takaful Ins.	0.86	-3.8%	-0.9%	1.38
Abu Dhabi National for Building Materials	0.32	8.1%	23.2%	0.16	Ras Al Khaimah Cement	2.88	-1.7%	266.9%	3.59
Alpha Dhabi Holding PJSC	25.50	3.6%	70.0%	212.00	Abu Dhabi National Energy	1.34	-1.5%	-6.9%	1.81
Dana Gas PJSC	0.85	2.5%	19.0%	15.89	Palms Sports	12.30	-0.7%	-6.8%	12.78
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	Insurance House	0.81	0.81	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Al Ain Ahlia Ins.	31.20	31.20	0.0%	0.00
Al Khazna Insurance Company	1.00	0.00	0.0%	0.00	National Bank of Fujairah	4.98	4.98	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	0.0%	0.00	National Bank of Umm Al Qaiwain	31.20	1.75	0.0%	0.00
Al Qudra Holding	2.95	2.95	0.0%	4.80	Sharjah Group Co.	0.80	0.80	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£)
GB AUTO	3.66	5.5%	10.2%	27.98	Six of October Devpt (SODIC)	17.00	-1.8%	14.6%	1.97
Sidi Kerir Petrochemicals	12.94	3.9%	39.0%	12.87	Cleopatra Hospital Company	4.56	-0.9%	-4.2%	4.82
Abou Kir Fertilizers	20.35	3.1%	-1.6%	11.27	Telecom Egypt	13.82	-0.6%	15.8%	2.55
ELSWEDY ELECTRIC	8.76	3.1%	-10.7%	22.12	Heliopolis Housing	4.75	-0.6%	-22.1%	3.71
Orascom Investment Holding	0.21	3.0%	16.4%	27.62	Export Development Bank	10.20	-0.2%	-14.5%	3.05
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	12.94	13.10	-1.2%	15.72	CI Capital Holding For Financial Investments	3.23	2.97	8.8%	2.37
Alexandria Mineral Oils Company	3.70	3.82	-3.1%	28.75	Citadel Capital - Common Shares	1.20	1.09	10.3%	5.24
Palm Hills Development Company	1.89	1.96	-3.6%	2.25	Heliopolis Housing	4.75	4.29	10.7%	7.87
Six of October Development & Investment (SODIC)	17.00	18.20	-6.6%	0.33	Orascom Financial Holding	0.29	0.26	13.5%	4.30
Telecom Egypt	13.82	14.80	-6.6%	3.90	Edita Food Industries S.A.E	7.89	6.93	13.9%	0.23

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Icici Bank	676.40	3.1%	26.4%	12901.926	Tata Motors	295.80	-2.2%	60.9%	9916.53
ITC	212.45	2.6%	1.7%	9391.59	Grasim Industries	1550.00	-2.0%	67.1%	2205.32
Wipro	598.00	2.4%	54.8%	8362.22	Adani Ports And Sez.	678.80	-1.9%	40.3%	5948.28
SBI Life Insurance	1048.95	2.2%	16.0%	1351.18	Larsen & Toubro	1617.00	-1.5%	25.6%	3659.70
Tata Consumer products Ltd.	776.85	1.7%	31.7%	1562.41	UPL	819.20	-1.1%	75.7%	1815.18
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	13208.00	13243.95	-0.3%	3807.95	Britannia Inds.	3441.80	3317.30	3.8%	852.28
Icici Bank	676.40	679.40	-0.4%	12901.93	Hero Motocorp	2835.90	2620.75	8.2%	1220.84
Infosys	1589.00	1598.50	-0.6%	6653.40	Reliance Industries	2104.00	1830.00	15.0%	9717.88
Wipro	598.00	601.80	-0.6%	8362.22	HUL	2358.95	2000.05	17.9%	3593.74
Divi's Laboratories Limited	4823.15	4856.40	-0.7%	857.94	Nestle India Limited	18071.85	15100.00	19.7%	1361.00

## 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	8.98	6.7%	10.0%	0.04	WPP Scangroup Plc	4.63	-3.1%	-22.8%	1.06
NCBA Group Plc	26.15	1.2%	-2.2%	0.78	The Cooperative Bank of Kenya Ltd	13.10	-2.6%	4.8%	1.61
Kenya Power & Lighting Limited	1.40	0.7%	-18.1%	0.66	KCB Group Plc	44.55	-0.4%	16.9%	21.25
Total Kenya Ltd	24.45	0.6%	1.9%	0.06	Equity Group Holdings Plc	47.85	-0.3%	30.9%	1.86
Centum Investment Company Plc	17.55	0.6%	9.3%	0.18	Absa Bank Kenya	9.86	-0.2%	2.1%	0.13
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%	285.23	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	7.36
Equity Group Holdings Plc	47.85	49.45	-3.2%	1.86	WPP Scangroup Plc	4.63	4.52	2.4%	1.06
Nation Media Group	25.00	26.05	-4.0%	0.43	Kengen Limited	4.32	3.90	10.8%	0.92
Stanbic Holdings	87.50	92.00	-4.9%	0.00	Diamond Trust Bank Limited	65.00	57.50	13.0%	1.10
East African Breweries Limited	184.50	194.00	-4.9%	3.56	Absa Bank Kenya	9.86	8.50	16.0%	0.13

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Research and Marketing Group	167.40	10.0%	113.2%	45.21	Raydan Food Co.	30.20	-2.7%	-8.5%	44.53
Ash-Sharqiyah Development Co.	110.60	7.4%	16.8%	264.08	The Saudi National Bank	54.00	-2.7%	24.6%	439.09
Al Hassan Ghazi Ibrahim Shaker Co.	33.65	6.7%	108.7%	255.20	Saudi Industrial Services Co.	49.25	-2.3%	52.0%	60.87
Saudi Electricity Co.	26.20	5.2%	23.0%	110.92	SABB Takaful Co.	33.30	-2.1%	8.6%	17.41
Saudi Arabian Mining Co.	67.50	5.1%	66.7%	99.34	Saudi Industrial Export Co.	112.00	-1.9%	0.4%	22.40
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	71.80	71.80	0.0%	47.46	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	42.25	42.25	0.0%	37.94	BinDawood Holding Co.	108.80	105.60	3.0%	14.96
Walaa Cooperative Insurance Co.	24.56	24.56	0.0%	20.82	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	39.65	39.65	0.0%	13.33	Saudi Airlines Catering Co.	77.00	70.50	9.2%	14.84
United Electronics Co.	134.00	134.00	0.0%	15.64	Savola Group	41.60	36.60	13.7%	17.81

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Redefine Properties	411.00	3.5%	23.4%	3154.83	Prosus (JSE)	138494.00	-1.7%	-13.8%	89874.85
Reinet Investments (JSE) SCA	28940.00	3.0%	5.0%	4673.00	Naspers Ltd	296053.00	-1.7%	-1.9%	206236.14
Investec Plc	5407.00	2.7%	47.6%	4236.61	Gold Fields	13490.00	-0.8%	-1.9%	17340.03
Investec Ltd (JSE)	5630.00	2.6%	49.5%	6878.04	Anglogold Ashanti	28350.00	-0.4%	-17.2%	16268.99
Anglo American (JSE)	60390.00	2.4%	25.0%	44893.62	Mr Price Group	21104.00	-0.4%	23.7%	18401.57
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)	40423.00	40492.00	-0.2%	8004.12	Prosus (JSE)	138494.00	128906.00	7.4%	89874.85
Aspen Phmc.Hdg.	17256.00	17421.00	-0.9%	12119.60	Vodacom Group	13128.00	12020.00	9.2%	12512.48
MTN Group	10713.00	10941.00	-2.1%	29141.32	Naspers Ltd	296053.00	268500.00	10.3%	206236.14
Bidvest Group	19387.00	20178.00	-3.9%	9276.60	Anglogold Ashanti	28350.00	25651.00	10.5%	16268.99
RMB Holdings Ltd	145.00	151.00	-4.0%	483.14	Gold Fields	13490.00	12193.00	10.6%	17340.03

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Sai Gon Thuong Tin Commercial	28700.00	2.5%	69.8%	1857393.19	Vincom Retail	27000.00	-4.3%	-14.0%	135.692.40
PetroVietnam Power Corp	10500.00	1.5%	-22.8%	129179.11	Vietnam Prosperity	58500.00	-3.8%	80.0%	671239.65
FPT Corp	90500.00	1.2%	77.7%	615896.52	Hoang Huy Investment Financial Services	18500.00	-3.4%	-7.3%	55981.95
Vinamilk	87600.00	0.9%	-18.7%	360.746.12	Vietcombank	97000.00	-3.3%	-0.9%	167356.74
					Masan Group Corp	119000.00	-3.2%	35.0%	198.014.40
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	119000.00	125000.00	-4.8%	196040.60	Vinamilk	87600.00	84000.00	4.3%	361498.92
Khang Dien House Trading and Investment JSC	38400.00	40500.00	-5.2%	248966.40	Hoang Huy Investment Financial Services	18500.00	17314.95	6.8%	55183.65
Phat Dat Real Estate Development Corp	88600.00	97500.00	-9.1%	235560.82	Vincom Retail	27000.00	25050.00	7.8%	133536.60
Petrovietnam Gas	88000.00	97500.00	-9.7%	31363.20	Bank for Inv. and Devp	40200.00	34958.13	15.0%	73304.70
Mobile World Inv. Corp	161700.00	179900.00	-10.1%	197904.63	Vietjet Aviation	113400.00	94300.00	20.3%	62868.96

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