

Daily Market Report

27 July 2021

JSE

JSE All-Share Index inched down 0.02% to close at 68,051.06 points on Monday, as the Industrial and Financial sectors recorded losses.

BRVM

BRVM Composite Index closed at 167.16 points, down by 0.05% on Monday with Bernabe Côte d'Ivoire and Nestle Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 0.47% to close at 38,849.08 points on Monday, as the Industrial, Oil & Gas, Banking and Consumer Goods sectors recorded gains.

EGX

EGX 30 Index decreased by 0.45% and closed at 10,697.32 points on Monday, as the market lost LE 1.4 billion of market cap, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index closed at 913.66 points on Monday, as it declined marginally by 0.09%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.02%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.05%
NSE Nigerian Stock Exchange	▲ 0.47%
EGX Egyptian Stock Exchange	▼ 0.45%
ESG Casablanca Stock Exchange	▼ 0.09%

African Markets

Nigeria: NSE 30 Index increased by 0.18% and closed at 1,651.99 points on Monday. Julius Berger and Lafarge Africa were the top gainers.

Egypt: EGX 30 Index decreased by 0.45% and closed at 10,697.32 points on Monday, as the market lost LE 1.4 billion of market cap, amid Egyptian and foreign selling.

Kenya: NSE 20 Index inched up by 0.02% and closed at 1,982.24 points on Monday. Kengen and British American Tobacco Kenya were the top gainers.

South Africa: JSE Top 40 Index inched up 0.02% to close at 61,946.37 points on Monday, as the Resources sector recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.15
INTERBANK RATES	
OBB	15.00 ▼
Overnight	15.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General rose 0.89% to close at 7,169.03 points on Monday, as International Holding Company and Alpha Dhabi Holding recorded gains. MSCI UAE Index rose 0.73% to close at 383.96 points.

Vietnam: VN-30 Index increased by 0.17% to close at 1,403.96 points on Monday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.73% to close at 985.67 points.

Saudi Arabia: Tadawul All Share Index was up by 0.20% to close at 10,897.87 points on Monday, as gains in Media, Healthcare, Telecom and Real Estate sector pushed the shares higher. MSCI Tadawul 30 Index increased by 0.36% to close at 1,449.96 points.

India: Nifty 50 decreased by 0.20% to close at 15,824.45 points on Monday, as losses in the Real Estate, Auto, Banking and Fast Moving Consumer Goods sectors pushed the shares lower. MSCI India was down by 0.11% to close at 1,842.02 points.

News

Nigeria:

91 others to benefit from W/Bank-COVAX vaccine financing
25,645 workers dump PFAs, move N102.59bn to other operators
Buhari Signs 2021 Supplementary Appropriation Bill Into Law

Kenya:

Tough inflation test as Central Bank monetary policy team meets
CBK Expected To Hold Benchmark Rate at 7%, says analysts
Kenya's Forex Reserves Fall by \$250 Million in One Week

Abu Dhabi:

Du parent EITC's Q2 profit jumps 11.4% to Dh240m
ADIO partners with tech firms to drive \$545mln Innovation Programme
CBUAE issues new anti-money laundering guidance for financial institutions

Saudi Arabia:

Saudi will see stronger Q3 growth as oil, non-oil sectors bounce back
Saudi Arabia suspends privatisation of desalination and power plant
Saudi Arabia to offer new housing deals to developers

Egypt:

Egypt registers primary surplus of 1.4% of GDP in FY 2020-2021
EGX announces details of "ABC's offer to acquire BLOM Bank Egypt
ITIDA Disburses EGP70 mn Export Incentive for Egyptian IT Companies

South Africa:

Prosus shareholders approve Naspers share purchase
Vodacom posts 14% rise in first quarter revenue
Pepkor's revenue surges to R53.9 bn despite constrained environment

India:

Axis Bank Q1: Net Profit Nearly Doubles On Lower Provisions, Higher Fee Income
Tata Motors nearly halves April-June loss to Rs 4.5k cr
Kotak Q1 net up 32% at Rs 1,642cr on interest

Vietnam:

Finance Ministry working on US\$1.04 billion support package
Vietnamese investors, contractors struggle due to higher steel price
Vietnam, Laos enjoy growth in two-way trade in H1

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,169.03	0.9%	1.5%	4.9%	42.1%	AED/USD	3.67	0.0%	0.0%
Egypt	10,697.32	-0.5%	0.5%	4.3%	-1.4%	EGP/USD	15.69	0.1%	-0.3%
India	15,824.45	-0.2%	-0.2%	0.7%	13.2%	INR/USD	74.42	0.0%	1.8%
Kenya	1,982.24	0.02%	0.0%	2.8%	6.1%	KES/USD	108.45	0.1%	-0.7%
Nigeria	1,651.99	0.2%	0.2%	3.6%	0.7%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	10,897.87	0.2%	1.0%	-0.8%	25.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,946.37	0.02%	0.0%	3.0%	13.9%	ZAR/USD	14.83	0.2%	1.0%
Vietnam	1,403.96	0.2%	0.2%	-8.2%	31.1%	VND/USD	23,009.00	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	635.31	0.8%	0.8%	-1.7%	11.1%	Brent Crude (\$)	74.50	0.5%	43.6%
MSCI Frontier 100	1,429.53	0.8%	0.8%	-0.7%	13.6%	Gold (\$)	1,803.40	-0.1%	-4.8%
MSCI Emerging	1,279.99	-2.4%	-2.4%	-6.9%	-0.9%	Copper (\$)	9,809.50	3.1%	25.6%
MSCI World (USD)	3,080.41	0.3%	0.3%	2.1%	14.5%	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 ₦)
UACN	11.40	8.6%	57.2%	82.93	United Capital PLC	7.04	-4.2%	68.8%	57.24
Julius Berger	21.90	7.9%	23.0%	12.95	UBN	5.30	-2.8%	-0.9%	2.01
Lafarge Africa	22.90	5.3%	8.8%	12.97	Wema	0.88	-1.1%	27.5%	9.81
Ecobank	5.30	3.9%	-11.7%	30.31	Zenith	24.65	-0.8%	-0.6%	199.79
P Z Cussons	6.00	3.4%	13.2%	12.23					
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	11.40	11.40	0.0%	82.93	Transcorp Hotels	3.57	3.25	9.8%	0.00
Total	203.20	203.20	0.0%	43.04	UBN	5.30	4.65	14.0%	2.01
Seplat Petroleum	770.00	770.00	0.0%	96.39	Ecobank	5.30	3.90	35.9%	30.31
P Z Cussons	6.00	6.00	0.0%	12.23	Unilever	14.30	10.50	36.2%	6.64
Okomu Oil	110.00	110.00	0.0%	7.73	Cap	20.80	15.25	36.4%	0.70

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi Ship Building	4.83	15.0%	107.3%	22.11	AXA Green Crescent Ins.	0.65	-4.5%	-5.2%	0.07
Ras Al Khaimah Cement	3.31	14.9%	321.7%	32.21	Bank of Sharjah PJSC	0.54	-1.8%	-14.3%	0.30
Al Qudra Holding	3.39	14.9%	208.2%	0.57	Arkan Building Materials	1.24	-1.6%	40.9%	5.78
Methaq Takaful Ins.	0.99	14.8%	13.7%	11.01	Eshraq Investments	0.34	-1.4%	8.2%	0.85
Gulf Cement	0.84	7.1%	-0.5%	0.14	Ras Al Khaimah Ceramics	2.29	-0.9%	52.7%	6.98
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	0.79	0.79	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	1.75	1.75	0.0%	0.00
Reem Investments PrJSC	35.66	35.66	0.0%	0.07	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	3.77	3.0%	13.6%	29.74	Emaar Misr for Development	2.39	-2.9%	0.8%	5.67
Ezz Steel	13.41	1.6%	25.0%	23.48	Alexandria Mineral Oils Company	3.62	-2.2%	16.0%	13.49
CI Capital Holding For Financial Investments	3.28	1.6%	-17.8%	3.49	Edita Food Industries S.A.E	7.72	-2.2%	-13.3%	1.70
Medinet Nasr Housing	3.24	1.3%	-15.2%	7.07	Sidi Kerir Petrochemicals	12.73	-1.6%	36.7%	9.86
Oriental Weavers	8.18	1.1%	19.4%	4.64	Ibsina Pharma	3.72	-1.6%	-26.9%	1.38
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	12.73	13.10	-2.8%	9.86	Heliopolis Housing	4.68	4.29	9.1%	7.92
Palm Hills Development Company	1.86	1.96	-4.9%	4.37	Citadel Capital - Common Shares	1.19	1.09	9.4%	4.06
Alexandria Mineral Oils Company	3.62	3.82	-5.2%	13.48	CI Capital Holding For Financial Investments	3.28	2.97	10.4%	3.49
Ezz Steel	13.41	14.40	-6.9%	23.48	Edita Food Industries S.A.E	7.72	6.93	11.4%	1.70
Telecom Egypt	13.76	14.80	-7.0%	4.92	Ibsina Pharma	3.72	3.32	12.0%	1.38

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
SBI Life Insurance	1092.05	4.0%	20.8%	2295.859	Jsw Steel	704.60	-1.8%	82.0%	10395.97
Bajaj Finserv	13515.85	2.4%	51.8%	5652.38	Wipro	589.95	-1.5%	52.7%	3623.28
Hindalco Industries	399.10	1.9%	65.9%	2825.02	Reliance Industries	2073.90	-1.5%	4.5%	11963.59
Divi's Laboratories Limited	4914.90	1.9%	27.9%	3038.56	State Bank Of India	422.85	-1.4%	53.8%	5956.26
Ultratech Cement	7620.00	1.7%	44.1%	2797.37	Bharat Petroleum	455.45	-1.3%	19.5%	1188.20
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Ultratech Cement	7620.00	7640.00	-0.3%	2797.37	Britannia Inds.	3481.00	3317.30	4.9%	1510.03
Bajaj Finserv	13515.85	13575.45	-0.4%	5652.38	Hero Motocorp	2809.80	2620.75	7.2%	883.93
Divi's Laboratories Limited	4914.90	4940.65	-0.5%	3038.56	Reliance Industries	2073.90	1830.00	13.3%	11963.59
Infosys	1603.05	1611.65	-0.5%	7366.49	HUL	2350.75	2000.05	17.5%	3080.21
Tata Steel	1297.00	1308.25	-0.9%	11237.53	HDFC Life Insurance Company Ltd	664.00	555.95	19.4%	1659.94

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	4.43	2.5%	-5.9%	1.61	Nairobi Securities Exchange Plc	8.72	-2.9%	6.9%	0.01
British American Tobacco Kenya Ltd	463.25	1.4%	28.3%	0.14	Absa Bank Kenya	9.66	-2.0%	0.0%	0.68
Equity Group Holdings Plc	48.35	1.0%	32.3%	8.51	Kenya Power & Lighting Limited	1.39	-0.7%	-18.7%	0.91
East African Breweries Limited	186.00	0.8%	20.6%	1.34	WPP Scangroup Plc	4.60	-0.6%	-23.3%	1.03
Kenya Reinsurance Corporation Ltd	2.54	0.8%	9.5%	0.80	Nation Media Group	24.85	-0.6%	60.8%	0.37
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%	32.30	WPP Scangroup Plc	4.60	4.52	1.8%	1.03
Equity Group Holdings Plc	48.35	49.45	-2.2%	8.51	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	6.99
East African Breweries Limited	186.00	194.00	-4.1%	1.34	Diamond Trust Bank Limited	65.00	57.50	13.0%	2.52
Nation Media Group	24.85	26.05	-4.6%	0.37	Kengen Limited	4.43	3.90	13.6%	1.61
KCB Group Plc	44.80	47.00	-4.7%	10.69	Absa Bank Kenya	9.66	8.50	13.6%	0.68

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Emaar The Economic City	13.44	6.5%	45.9%	353.53	CHUBB Arabia Coop. Insurance	33.40	-3.9%	2.9%	27.57
Saudi Industrial Export Co.	118.20	5.5%	5.9%	79.04	Abdulmohsen Alhokair Group for Tourism and Development	23.34	-3.5%	10.2%	12.05
National Gas and Industrialization Co.	44.95	5.2%	47.4%	45.31	Al Moammar Info Systems Co.	151.60	-3.4%	57.6%	88.79
Gulf General Cooperative Insurance Co.	19.84	4.4%	-20.2%	31.43	United Coop. Assurance Co.	28.60	-2.6%	67.3%	6.49
Saudi Research and Marketing Group	173.80	3.8%	121.4%	133.83	Al Hassan Ghazi Ibrahim Shaker Co.	32.85	-2.4%	103.8%	306.38
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	71.20	71.20	0.0%	25.33	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	41.40	41.40	0.0%	28.09	BinDawood Holding Co.	109.00	105.60	3.2%	9.04
Wala Cooperative Insurance Co.	24.60	24.60	0.0%	22.14	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	39.35	39.35	0.0%	9.62	Saudi Airlines Catering Co.	76.80	70.50	8.9%	11.09
United Electronics Co.	134.80	134.80	0.0%	15.93	Savola Group	41.95	36.60	14.6%	21.94

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum	184698.00	7.9%	28.0%	51322.59	Prosus (JSE)	127963.00	-7.6%	-20.3%	173143.41
Impala Platinum	25070.00	5.0%	24.2%	79888.39	Naspers Ltd	274801.00	-7.2%	-9.0%	611200.57
Northam Platinum	22978.00	4.1%	9.7%	29394.72	Nedbank Group	16141.00	-2.3%	24.7%	11323.36
Anglo American (JSE)	62794.00	4.0%	30.0%	64737.47	Mr Price Group	20649.00	-2.2%	21.0%	17764.40
RMB Holdings Ltd	150.00	3.4%	80.4%	641.39	Vodacom Group	12900.00	-1.7%	3.7%	14156.94
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)
RMB Holdings Ltd	150.00	151.00	-0.7%	641.39	Prosus (JSE)	127963.00	126000.00	1.6%	173143.41
Mondi (JSE)	40813.00	41270.00	-1.1%	11188.07	Naspers Ltd	274801.00	268500.00	2.3%	611200.57
Aspen Phmc.Hdg.	17062.00	17442.00	-2.2%	21442.91	Vodacom Group	12900.00	12020.00	7.3%	14156.94
MTN Group	10540.00	10941.00	-3.7%	37111.43	Spar Group	17827.00	16103.00	10.7%	12359.82
BHP Group (JSE)	47500.00	49575.00	-4.2%	36928.69	Brit.Amer.Tobacco (JSE)	56771.00	50757.00	11.8%	26570.36

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
No Va Land Invest	107500.00	4.4%	123.5%	373.861.21	Vietnam Prosperity	56700.00	-3.1%	74.5%	534.513.87
FPT Corp	93700.00	3.5%	84.0%	531680.62	Military Commercial Bank	27200.00	-2.0%	61.1%	434.641.61
Phat Dat Real Estate Development Corp	90500.00	2.1%	115.9%	259426.69	Vietnam JSC Bank	32150.00	-1.1%	20.1%	326.423.18
Khang Dien House Trading & Investment	39150.00	2.0%	47.0%	238958.85	Vietcombank	96000.00	-1.0%	-1.9%	121.619.97
Thanh Thanh Cong Tay Ninh	18500.00	1.9%	-11.7%	36967.72	Techcombank	49000.00	-1.0%	55.6%	707920.08
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	121100.00	125000.00	-3.1%	152234.81	Vinamilk	88900.00	84000.00	5.8%	248164.35
Khang Dien House Trading and Investment JSC	39150.00	40500.00	-3.3%	236873.16	Vincom Retail	26750.00	25050.00	6.8%	83524.20
Phat Dat Real Estate Development Corp	90500.00	97500.00	-7.2%	264232.85	Hoang Huy Investment Financial Services	18600.00	17314.95	7.4%	46139.16
Vinhomes	109600.00	120400.00	-9.0%	301783.60	Bank for Inv. and Devp	40000.00	34958.13	14.4%	57476.00
Petrovietnam Gas	88300.00	97500.00	-9.4%	54260.35	Vietjet Aviation	114000.00	94300.00	20.9%	70531.80

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