

# 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%.

### 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.

### 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%

### 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:

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 \$545m 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	Ibnsina 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	Ibnsina 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
Walaa 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.R.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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