

Daily Market Report

28 July 2021

JSE

JSE All-Share Index declined by 1.04% to close at 67,340.75 points on Tuesday, as the Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 167.66 points, up by 0.30% on Tuesday with BICI Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased by 0.12% to close at 38,802.15 points on Tuesday, as the Insurance sector recorded losses.

EGX

EGX 30 Index increased by 0.62% and closed at 10,763.26 points on Tuesday, as the market gained LE 4.73 billion of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index closed at 916.51 points on Tuesday, as it increased by 0.31%.

African Markets

Nigeria: NSE 30 Index decreased by 0.18% and closed at 1,649.05 points on Tuesday. International Breweries and Sterling were the top losers.

Egypt: EGX 30 Index increased by 0.62% and closed at 10,763.26 points on Tuesday, as the market gained LE 4.73 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index inched up by 0.06% and closed at 1,983.51 points on Tuesday. Stanbic Holdings and The Cooperative Bank of Kenya were the top gainers.

South Africa: JSE Top 40 Index fell 1.19% to close at 61,208.33 points on Tuesday, as the Industrial and Resources sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 1.04%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 0.30%

NSE Nigerian Stock Exchange ▼ 0.12%

EGX Egyptian Stock Exchange ▲ 0.62%

ESG Casablanca Stock Exchange ▲ 0.31%

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.16

INTERBANK RATES

OBB	15.75 ▲
Overnight	16.25 ▲

Other Emerging Markets

Abu Dhabi: ADX General inched up 0.03% to close at 7,170.96 points on Tuesday, as Aldar Properties and Alpha Dhabi Holding recorded gains. MSCI UAE Index increased marginally by 0.06% to close at 384.21 points.

Vietnam: VN-30 Index increased by 0.42% to close at 1,409.85 points on Tuesday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.39% to close at 989.50 points.

Saudi Arabia: Tadawul All Share Index was up by 0.17% to close at 10,916.67 points on Tuesday, as gains in Media, Insurance, Telecom and Consumer Services sector pushed the shares higher. MSCI Tadawul 30 Index increased by 0.27% to close at 1,453.90 points.

India: Nifty 50 decreased by 0.49% to close at 15,746.45 points on Tuesday, as losses in the Pharma, Real Estate, Auto, Banking and Media sectors pushed the shares lower. MSCI India fell 0.58% to close at 1,831.34 points.

News

Nigeria:

CBN Suspends Sale of FOREX to BDCs
FBNQuest lists commercial paper on FMDQ Exchange
Naira slides to 505/\$ as CBN stops forex sale to BDCs

Kenya:

Treasury targets Sh60 billion in August bonds sale
Centum reports first full-year loss in 42 years
Shilling hits three-month low ahead of CBK policy meeting

Abu Dhabi:

RAKBank reports 25% jump in 2Q net profit amid continued economic recovery
UAE's Dana Gas wins arbitration on sale of Egypt assets
Mortgage-backed home sales in Dubai soar to 40%

Saudi Arabia:

Saudi Central Bank steps up efforts to increase locals in financial sector
Fitch revises outlook on 6 Saudi banks to 'Stable'
Saudi Ceramic's H1 profits leap 679%

Egypt:

SODIC announces closure of 1st issuance of LE 343M securitization bonds
Egypt signs 4 contracts with 2nd largest gold exploration company in world
Marble, granite exports hit \$128m in first 5 months of 2021

South Africa:

Prosus faces investor criticism over R2.1bn fee for Naspers share swap
Reinet Investments steady despite slight decline in 1Q net asset value
Banks pledge to support clients hit by recent unrest

India:

IMF cuts India's FY22 GDP forecast to 9.5% from 12.5%
Unclaimed funds with banks, insurance cos near Rs 50,000 crore
Dr Reddy's profit drops 36% to Rs 380.4 crore in June quarter

Vietnam:

Vietnam's FDI inflows plunge 11.1% in seven months
Parliament eyes average growth of 6.5 - 7 % for five years
Vietnam's footwear exports rake in 11.27 billion USD

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,170.96	0.03%	1.5%	4.9%	42.1%	AED/USD	3.67	0.0%	0.0%
Egypt	10,763.26	0.6%	1.1%	4.9%	-0.8%	EGP/USD	15.69	0.0%	-0.3%
India	15,746.45	-0.5%	-0.7%	0.2%	12.6%	INR/USD	74.47	0.1%	1.9%
Kenya	1,983.51	0.1%	0.1%	2.9%	6.2%	KES/USD	108.50	0.0%	-0.6%
Nigeria	1,649.05	-0.2%	0.0%	3.4%	0.5%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	10,916.67	0.2%	1.1%	-0.6%	25.6%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,208.33	-1.2%	-1.2%	1.7%	12.6%	ZAR/USD	14.82	-0.1%	0.9%
Vietnam	1,409.85	0.4%	0.6%	-7.8%	31.7%	VND/USD	23,006.50	0.0%	-0.3%

MSCI Emerging Markets

MSCI Frontier	635.60	0.0%	0.8%	-1.7%	11.2%	Brent Crude (\$)	74.48	-0.03%	43.5%
MSCI Frontier 100	1,427.91	-0.1%	0.7%	-0.8%	13.5%	Gold (\$)	1,804.00	0.03%	-4.8%
MSCI Emerging	1,252.43	-2.2%	-4.5%	-8.9%	-3.0%	Copper (\$)	9,758.50	-0.5%	25.5%
MSCI World (USD)	3,068.87	-0.4%	-0.1%	1.7%	14.1%	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 ₦)
Julius Berger	22.50	2.7%	26.4%	9.92	Wema	0.86	-2.3%	24.6%	17.86
FCMB	3.08	2.7%	-7.5%	33.38	International Breweries	5.10	-1.9%	-14.3%	8.74
Dangote Sugar	18.25	2.2%	3.7%	37.82	Sterling	1.54	-1.3%	-24.5%	5.37
Fidelity	2.50	1.6%	-0.8%	19.64	United Capital PLC	6.95	-1.3%	66.7%	23.36
Stanbic IBTC	41.00	0.7%	-6.9%	17.45	MTNN	163.10	-1.2%	-4.0%	220.40
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	11.30	11.30	0.0%	162.19	Transcorp Hotels	3.57	3.25	9.8%	0.21
Total	203.20	203.20	0.0%	30.73	UBN	5.30	4.65	14.0%	5.06
Seplat Petroleum	770.00	770.00	0.0%	10.99	Ecobank	5.25	3.90	34.6%	17.64
P Z Cussons	6.00	6.00	0.0%	67.86	Unilever	14.15	10.50	34.8%	10.48
Okomu Oil	110.00	110.00	0.0%	4.16	Sterling	1.54	1.13	36.3%	5.37

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easylease motorcycle rentals	26.94	7.7%	53.1%	2.85	National Corp for Tourism and Hotels	3.00	-6.3%	65.7%	0.08
Manazel PJSC	0.39	5.4%	12.6%	23.54	Fujairah Cement Industries	0.55	-5.6%	-58.7%	0.08
ALPHA DHABI HOLDING PJSC	26.48	3.0%	76.5%	120.52	Methaq Takaful Ins.	0.94	-5.3%	7.7%	5.64
Ras Al Khaimah Cement	3.40	2.7%	333.1%	31.73	Reem Investments	34.00	-4.7%	54.5%	0.07
Sudatel Telecom	0.39	2.6%	-6.0%	0.00	Bank of Sharjah PJSC	0.52	-3.5%	-17.3%	0.26
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	1.00	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	34.00	35.66	-4.7%	0.07	Sharjah Group Co.	0.80	0.80	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn EE)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn EE)
MM Group For Industry And International Trade	7.22	4.0%	-7.9%	13.51	Orascom Development	5.41	-1.6%	10.4%	2.23
Telecom Egypt	14.18	3.1%	18.9%	50.50	Emaar Misr for Development	2.36	-1.3%	-0.4%	2.75
Fawry For Banking Tech And Electronic Payment	19.54	3.0%	-25.2%	115.66	Alexandria Mineral Oils Company	3.60	-0.6%	15.4%	22.81
Pioneers Holding	4.59	2.7%	14.2%	27.75	Orascom Investment Holding	0.21	-0.5%	-62.9%	9.70
GB AUTO	3.87	2.7%	16.6%	16.65	Credit Agricole Egypt	23.87	-0.4%	-17.7%	6.18
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn EE)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn EE)
Sidi Kerir Petrochemicals	12.70	13.10	-3.1%	7.25	Heliopolis Housing	4.74	4.29	10.5%	10.52
Palm Hills Development Company	1.88	1.96	-4.0%	6.23	Citadel Capital - Common Shares	1.21	1.09	10.7%	5.94
Telecom Egypt	14.18	14.80	-4.2%	50.51	Edita Food Industries S.A.E	7.70	6.93	11.1%	1.15
Ezz Steel	13.59	14.40	-5.6%	12.58	Emaar Misr for Development	2.36	2.12	11.3%	2.75
Alexandria Mineral Oils Company	3.60	3.82	-5.8%	22.81	CI Capital Holding For Financial Investments	3.35	2.97	12.8%	1.89

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hindalco Industries	417.35	4.3%	73.5%	11716.324	Dr Reddys Lab	4853.20	-10.3%	-6.8%	29180.44
SBI Life Insurance	1111.00	3.2%	22.9%	6671.00	Cipla	917.15	-3.5%	11.9%	3112.50
Tata Steel	1333.50	2.7%	107.2%	13675.55	Axis Bank	731.65	-3.3%	17.9%	11446.97
Bajaj Finserv	13795.60	2.0%	54.9%	5678.62	Adani Ports And Sez.	662.35	-3.0%	36.9%	4794.88
State Bank Of India	429.20	1.4%	56.1%	10371.44	Divi's Laboratories Limited	4800.00	-2.5%	24.9%	4514.16
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tata Steel	1333.50	1334.50	-0.1%	13675.55	Britannia Inds.	3451.75	3317.30	4.1%	729.76
SBI Life Insurance	1111.00	1113.75	-0.2%	6671.00	Hero Motocorp	2794.00	2620.75	6.6%	1200.11
Bajaj Finserv	13795.60	13844.95	-0.4%	5678.62	Reliance Industries	2054.00	1830.00	12.2%	10300.70
Infosys	1600.10	1611.65	-0.7%	9446.55	HUL	2341.00	2000.05	17.0%	3881.16
Ultratech Cement	7585.00	7675.00	-1.2%	2266.32	HDFC Life Insurance Company Ltd	669.75	555.95	20.5%	2351.80

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	89.75	2.6%	5.6%	0.19	Centum Investment Company Plc	16.15	-8.2%	0.6%	1.10
The Cooperative Bank of Kenya Ltd	13.45	2.3%	7.6%	7.23	Safaricom Plc	41.80	-2.3%	22.0%	143.52
Diamond Trust Bank Limited	66.25	1.9%	-11.7%	2.39	WPP Scangroup Plc	4.51	-2.0%	-24.8%	1.41
British American Tobacco Kenya Ltd	469.50	1.3%	30.1%	0.05	Bamburi Cement Limited	38.40	-1.7%	1.5%	0.10
NCBA Group Plc	26.40	1.1%	-1.3%	0.96	East African Breweries Limited	184.00	-1.1%	19.3%	164.40
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	48.50	49.45	-1.9%	14.27	WPP Scangroup Plc	4.51	4.48	0.7%	1.41
Stanbic Holdings	89.75	92.00	-2.4%	0.19	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	1.92
Safaricom Plc	41.80	43.45	-3.8%	143.52	Kengen Limited	4.46	3.90	14.4%	0.69
Nation Media Group	25.00	26.05	-4.0%	0.83	Absa Bank Kenya	9.74	8.50	14.6%	0.60
KCB Group Plc	45.00	47.00	-4.3%	69.18	Centum Investment Company Plc	16.15	14.05	14.9%	1.10

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Alandalus Property Co.	30.25	10.0%	42.8%	262.63	National Medical Care Co.	69.50	-3.7%	30.1%	21.48
AXA Cooperative Insurance	43.55	6.6%	22.0%	76.51	Saudi Electricity Co.	25.25	-2.7%	18.5%	67.67
Al Mashaar REIT	11.90	5.7%	48.8%	73.40	United Electronics	131.20	-2.7%	51.7%	15.25
Gulf General Cooperative Insurance Co.	20.80	4.8%	-16.3%	143.09	Al Hassan Ghazi Ibrahim Shaker Co.	32.05	-2.4%	98.8%	95.93
Herfy Food Services Co.	67.00	4.7%	12.4%	168.84	Al Hammadi Co for Development and Investment	39.10	-2.4%	35.3%	4.74
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	72.00	72.00	0.0%	126.36	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	41.25	41.25	0.0%	26.77	BinDawood Holding Co.	108.20	105.60	2.5%	10.89
Walaa Cooperative Insurance Co.	24.80	24.80	0.0%	30.51	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	131.20	131.20	0.0%	15.25	Saudi Airlines Catering Co.	78.50	70.50	11.3%	39.25
United Cooperative Assurance Co.	28.75	28.75	0.0%	1.60	Savola Group	41.70	36.60	13.9%	29.11

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Spar Group	18241.00	2.3%	-3.8%	9908.37	Naspers Ltd	254662.00	-7.3%	-15.7%	600515.15
Bidvest Group	19505.00	2.2%	24.2%	14907.67	Prosus (JSE)	118625.00	-7.3%	-26.1%	237826.87
Mr Price Group	21100.00	2.2%	23.6%	18340.65	Sasol Limited	21579.00	-3.0%	61.1%	37689.10
Remgro Limited	11079.00	1.9%	15.2%	7230.21	RMB Holdings Ltd	147.00	-2.0%	76.8%	300.17
Nedbank Group	16406.00	1.6%	26.7%	19593.47	Northam Platinum	22600.00	-1.6%	7.9%	25418.02
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)	41170.00	41270.00	-0.2%	13543.32	Naspers Ltd	254662.00	247868.00	2.7%	600515.15
RMB Holdings Ltd	147.00	151.00	-2.6%	300.17	Prosus (JSE)	118625.00	114101.00	4.0%	237826.87
Aspen Phmc.R.Hdg.	17333.00	17839.00	-2.8%	15393.26	Vodacom Group	13006.00	12020.00	8.2%	13406.45
MTN Group	10588.00	10941.00	-3.2%	30606.55	Discovery Ltd	11873.00	10650.00	11.5%	16547.02
Bidvest Group	19505.00	20178.00	-3.3%	14907.67	Brit.Amer.Tobacco (JSE)	56870.00	50757.00	12.0%	22109.52

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Tien Phong Commercial Joint Stock Bank	34100.00	3.7%	27.2%	320.401.77	Vinhomes	107800.00	-1.6%	20.4%	580376.10
Masan Group Corp	125500.00	3.6%	42.4%	241.565.85	Vinamilk	87500.00	-1.6%	-18.8%	211236.99
Vincom Retail	27650.00	3.4%	-11.9%	167474.45	Mobile World Inv. Corp	158000.00	-1.4%	32.9%	234.626.98
PetroVietnam Power Corp	10800.00	2.9%	-20.6%	121.623.82	Thanh Thanh Cong Tay Ninh	18300.00	-1.1%	-12.6%	31473.53
Saigon Securities Inc	52000.00	2.4%	60.1%	776277.44	Vietcombank	95000.00	-1.0%	-3.0%	255.111.60
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)
FPT Corp	93200.00	95000.00	-1.9%	466652.40	Vinamilk	87500.00	84000.00	4.2%	208967.50
Khang Dien House Trading and Investment JSC	39250.00	40500.00	-3.1%	183976.53	Hoang Huy Investment Financial Services	18800.00	17314.95	8.6%	71549.04
Phat Dat Real Estate Development Corp	89800.00	97500.00	-7.9%	284773.76	Vincom Retail	27650.00	25050.00	10.4%	167570.06
Petrovietnam Gas	89000.00	97500.00	-8.7%	78133.10	Bank for Inv. and Devp	40200.00	35203.97	14.2%	57441.78
Vinhomes	107800.00	120400.00	-10.5%	575921.50	Vietjet Aviation	114900.00	94300.00	21.8%	71525.25

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