

Daily Market Report

29 July 2021

JSE

JSE All-Share Index rose 1.76% to close at 68,525.56 points on Wednesday, as all the sectors recorded gains.

BRVM

BRVM Composite Index closed at 168.07 points, up by 0.24% on Wednesday with Tractafic Motors Côte d'Ivoire and Vivo Energy Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched down 0.03% to close at 38,791.03 points on Wednesday, as the Banking and Insurance sectors recorded losses.

EGX

EGX 30 Index inched up by 0.06% and closed at 10,769.22 points on Wednesday, as the market gained LE 2.47 billion of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index closed at 918.85 points on Wednesday, as it increased by 0.26%.

African Markets

Nigeria: NSE 30 Index decreased marginally by 0.08% and closed at 1,647.73 points on Wednesday. Fidelity and FCMB were the top losers.

Egypt: EGX 30 Index inched up by 0.06% and closed at 10,769.22 points on Wednesday, as the market gained LE 2.47 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index declined by 0.28% and closed at 1,978.03 points on Wednesday. Centum Investment Company and Bamburi Cement were the top losers.

South Africa: JSE Top 40 Index jumped 1.90% to close at 62,368.63 points on Wednesday, as all the sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 1.76%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.24%

NSE
Nigerian Stock Exchange ▼ 0.03%

EGX
Egyptian Stock Exchange ▲ 0.06%

ESG
Casablanca Stock Exchange ▲ 0.26%

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.16
INTERBANK RATES	
OBB	15.50 ▼
Overnight	16.00 ▼

Other Emerging Markets

Abu Dhabi: ADX General rose 1.02% to close at 7,243.78 points on Wednesday, as Aldar Properties and Alpha Dhabi Holding recorded gains. MSCI UAE Index increased by 0.16% to close at 384.83 points.

Vietnam: VN-30 Index declined by 0.17% to close at 1,407.50 points on Wednesday, as the blue chip companies recorded losses. MSCI Vietnam decreased marginally by 0.07% to close at 988.81 points.

Saudi Arabia: Tadawul All Share Index increased by 0.16% to close at 10,933.73 points on Wednesday, as gains in the Transport, Energy & Utilities and Media & Publishing sectors pushed the shares higher. MSCI Tadawul 30 Index inched up by 0.03% to close at 1,454.29 points.

India: Nifty 50 decreased by 0.24% to close at 15,709.40 points on Wednesday, as losses in the Auto, Banking and Real Estate sectors pushed the shares lower. MSCI India increased marginally by 0.002% to close at 1,831.38 points.

News

Nigeria:

Presco shareholders approve N2bn dividend payment
Nigeria's capital importation fell to \$875.62m in Q2
CBN disburses N756.5bn loan to 3.7 million farmers

Kenya:

CBK Retains Benchmark Rate at 7%
Kenya, UK sign Sh20bn in deals on Uhuru visit
Judges keep VAT on fuel, M-Pesa tax to November

Abu Dhabi:

FAB posts 11% jump in H1 profit to Dh5.4b
DP World's growth rates to moderate in H2; mindful of economy disruptions
Mubadala invests \$250 mn in global biosimulation firm Certara

Saudi Arabia:

Saudi Arabia's exports leap 120%, trade surplus hits \$10bn in May
Saudi Arabia's oil exports climb 147% to \$16bn in May
Zahrat Al Waha unveils capital expansion plan

Egypt:

EGX finalizes periodic review for its indices to be effective August 1
MEVAC plans to invest LE 1.8B to establish 3 factories to produce vaccines
Egypt, South Sudan eye bolstering cooperation in multiple fields

South Africa:

South Africa to Spend \$2.6 Billion to Help Spur Riot-Hit Economy
R350 relief grant to cost the fiscus R27bn - Mboweni
Sasol delivers on output targets despite bad weather and Covid-19

India:

Maruti Suzuki reports first-quarter profit of Rs 441 crore
RBI fines Axis Rs 5cr for cyber lapses
JSW Cement raises Rs 1.5k cr from PEs

Vietnam:

Binh Phuoc: Seven-month industrial production up 15.63 percent
Digiworld records significant growth in profit, boosted by mobile phone sales
Vietnamese rubber producers benefit from higher prices in Q2

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,243.78	1.0%	2.5%	6.0%	43.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,769.22	0.1%	1.1%	5.0%	-0.7%	EGP/USD	15.72	0.2%	-0.1%
India	15,709.40	-0.2%	-0.9%	-0.1%	12.4%	INR/USD	74.38	-0.1%	1.8%
Kenya	1,978.03	-0.3%	-0.2%	2.6%	5.9%	KES/USD	108.60	0.1%	-0.5%
Nigeria	1,647.73	-0.1%	-0.1%	3.3%	0.5%	NGN/USD	411.50	-0.1%	4.2%
Saudi Arabia	10,933.73	0.2%	1.3%	-0.5%	25.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,368.63	1.9%	0.7%	3.7%	14.7%	ZAR/USD	14.84	0.2%	1.1%
Vietnam	1,407.50	-0.2%	0.4%	-7.9%	31.4%	VND/USD	23,000.50	0.0%	-0.4%

MSCI Emerging Markets

MSCI Frontier	636.10	0.1%	0.9%	-1.6%	11.3%	Brent Crude (\$)	74.74	0.3%	43.8%
MSCI Frontier 100	1,428.79	0.1%	0.8%	-0.8%	13.6%	Gold (\$)	1,804.60	0.03%	-4.8%
MSCI Emerging	1,268.21	1.3%	-3.3%	-7.7%	-1.8%	Copper (\$)	9,686.00	-0.7%	24.7%
MSCI World (USD)	3,069.49	0.0%	-0.1%	1.7%	14.1%	Coffee (\$)	174.21	-2.6%	46.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	5.35	1.9%	-10.8%	14.63	Fidelity	2.41	-3.6%	-4.4%	28.79
UBN	5.40	1.9%	0.9%	21.10	FCMB	3.02	-1.9%	-9.3%	10.84
Dangote Sugar	18.50	1.4%	5.1%	43.88	Zenith	24.40	-1.6%	-1.6%	270.80
MTNN	163.50	0.2%	-3.8%	264.30	UBA	7.70	-1.3%	-11.0%	150.75
					Wema	0.85	-1.2%	23.2%	11.88
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	11.20	11.20	0.0%	55.27	Transcorp Hotels	3.57	3.25	9.8%	0.05
Total	203.20	203.20	0.0%	23.29	UBN	5.40	4.65	16.1%	21.10
Seplat Petroleum	770.00	770.00	0.0%	1.12	Unilever	14.15	10.50	34.8%	5.69
P Z Cussons	6.00	6.00	0.0%	1.94	Sterling	1.54	1.13	36.3%	1.74
Okomu Oil	110.00	110.00	0.0%	10.26	Cap	20.80	15.25	36.4%	3.69

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Emirates Driving Co.	19.00	8.6%	42.4%	4.66	Al Qudra Holding	2.97	-10.0%	170.0%	6.81
ALPHA DHABI HOLDING PJSC	28.72	8.5%	91.5%	176.13	National Bank of Umm Al Qaiwain	1.60	-8.6%	-20.0%	0.00
Ras Al Khaimah Ceramics	2.30	2.2%	53.3%	0.62	REEM INVESTMENTS PrJSC	32.00	-5.9%	45.5%	0.05
RAK Properties PJSC	0.67	2.0%	40.2%	19.36	Sharjah Cement	0.66	-5.3%	-13.2%	0.15
Al Dar Properties	3.93	1.8%	24.8%	330.42	National Corp for Tourism and Hotels	2.90	-3.3%	60.2%	0.03
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	1.60	1.60	0.0%	0.00
Fujairah Building Industries	1.50	1.50	0.0%	0.00	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)
CI Capital Holding For Financial Investments	3.47	3.6%	-13.0%	7.99	Alexandria Mineral Oils Company	3.51	-2.5%	12.5%	54.80
Ibsina Pharma	3.88	2.9%	-23.8%	16.91	Six of October Development & Investment (SODIC)	16.59	-2.0%	11.8%	2.52
Cleopatra Hospital Company	4.78	2.8%	0.4%	18.46	Abou Kir Fertilizers	20.03	-1.4%	-3.1%	5.06
Heliopolis Housing	4.86	2.5%	-20.3%	9.85	Telecom Egypt	14.01	-1.2%	17.4%	5.12
Pioneers Holding	4.68	2.0%	16.4%	24.76	Sidi Kerir Petrochemicals	12.55	-1.2%	34.8%	10.11
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	12.55	13.10	-4.2%	10.12	Edita Food Industries S.A.E	7.70	6.93	11.1%	1.13
Palm Hills Development Company	1.88	1.96	-4.2%	2.85	Citadel Capital - Common Shares	1.22	1.09	12.1%	9.52
Telecom Egypt	14.01	14.80	-5.3%	5.12	Emaar Misr for Development	2.38	2.12	12.3%	7.83
Ezz Steel	13.52	14.40	-6.1%	15.33	Heliopolis Housing	4.86	4.29	13.3%	9.86
Oriental Weavers	8.31	8.88	-6.4%	2.21	Credit Agricole Egypt	23.88	21.05	13.4%	5.40

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	567.80	5.0%	11.4%	17876.136	Kotak Mahindra Bank	1654.00	-2.6%	-17.1%	8412.03
Tata Steel	1368.05	2.8%	112.5%	17170.83	Dr Reddys Lab	4720.00	-2.6%	-9.3%	15366.25
SBI Life Insurance	1129.00	2.2%	24.9%	4942.16	Tata Motors	285.00	-2.2%	55.0%	10333.43
Divi's Laboratories Limited	4889.80	2.1%	27.3%	4655.72	Cipla	894.00	-2.1%	9.0%	4566.15
Indusind Bank	993.00	1.8%	11.0%	8753.57	Mahindra & Mahindra	729.95	-2.1%	1.3%	2936.61
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	1368.05	1369.95	-0.1%	17170.83	Britannia Inds.	3418.00	3317.30	3.0%	1204.12
Ultratech Cement	7670.00	7685.00	-0.2%	2200.67	Hero Motocorp	2777.00	2620.75	6.0%	1152.28
Icici Bank	686.00	687.75	-0.3%	12424.51	Reliance Industries	2035.00	1830.00	11.2%	12106.20
Infosys	1607.00	1611.65	-0.3%	7487.05	HUL	2361.00	2000.05	18.0%	2153.17
Bajaj Finserv	13960.00	14001.00	-0.3%	4444.24	Dr Reddys Lab	4720.00	3962.95	19.1%	15366.25

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	8.94	2.5%	9.6%	0.08	Centum Investment Company Plc	15.25	-5.6%	-5.0%	1.82
NCBA Group Plc	26.80	1.5%	0.2%	1.51	Bamburi Cement Limited	37.60	-2.1%	-0.7%	0.08
Absa Bank Kenya	9.88	1.4%	2.3%	6.34	British American Tobacco Kenya Ltd	461.50	-1.7%	27.8%	0.51
Total Kenya Ltd	24.95	1.2%	4.0%	0.09	Stanbic Holdings	88.50	-1.4%	4.1%	0.11
KCB Group Plc	45.35	0.8%	19.0%	21.08	Equity Group Holdings Plc	48.15	-0.7%	31.7%	8.10
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)
Equity Group Holdings Plc	48.15	49.45	-2.6%	8.10	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	5.44
KCB Group Plc	45.35	47.00	-3.5%	21.08	WPP Scangroup Plc	4.52	4.42	2.3%	0.05
NCBA Group Plc	26.80	27.85	-3.8%	1.51	Centum Investment Company Plc	15.25	14.05	8.5%	1.82
Stanbic Holdings	88.50	92.00	-3.8%	0.11	Kengen Limited	4.45	3.90	14.1%	0.43
Safaricom Plc	41.75	43.45	-3.9%	132.74	Diamond Trust Bank Limited	66.25	57.50	15.2%	0.28

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Abdulmohsen Alhokair Group for Tourism and Development	24.36	4.6%	15.0%	54.86	Rabigh Refining and Petrochemical	25.95	-4.1%	87.8%	253.07
Alujain Holding Corp.	62.20	4.5%	32.2%	120.04	Sahara International Petrochemical Co.	33.00	-2.9%	90.5%	106.68
Taleem REIT Fund	15.08	4.3%	17.1%	16.82	Gulf General Cooperative Insurance Co.	20.30	-2.4%	-18.3%	32.25
United International Transportation Co.	47.90	3.6%	26.1%	95.95	Al Mashaar REIT	11.64	-2.2%	45.5%	39.14
Saudi Industrial Services Co.	49.45	3.2%	52.6%	65.78	AXA Cooperative Insurance Co.	42.60	-2.2%	19.3%	34.94
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	72.50	72.50	0.0%	52.28	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	40.60	40.60	0.0%	18.08	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Walaa Cooperative Insurance Co.	24.78	24.78	0.0%	19.95	BinDawood Holding Co.	110.20	105.60	4.4%	25.74
United Wire Factories Co.	39.50	39.50	0.0%	12.38	Saudi Airlines Catering Co.	77.80	70.50	10.4%	16.08
United Electronics Co.	135.00	135.00	0.0%	21.72	Savola Group	42.50	36.60	16.1%	23.08

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	274744.00	7.9%	-9.0%	613710.23	Brit.Amer.Tobacco	56338.00	-0.9%	3.3%	25052.27
Prosus	126762.00	6.9%	-21.1%	173295.57	MTN Group	10499.00	-0.8%	74.4%	44227.17
Sibanye Stillwater	6338.00	3.0%	5.6%	54667.32	Nepi Rockcastle	9982.00	-0.5%	6.8%	14663.31
Anglo American Platinum	187569.00	2.7%	30.0%	25712.90	Firststrand Ltd	5344.00	-0.5%	4.7%	34441.64
Impala Platinum	25498.00	2.7%	26.3%	89557.59	Vodacom Group	12948.00	-0.4%	4.1%	7976.05
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	41265.00	41490.00	-0.5%	8753.59	Vodacom Group	12948.00	12020.00	7.7%	7976.05
RMB Holdings Ltd	148.00	151.00	-2.0%	371.88	Naspers Ltd	274744.00	247868.00	10.8%	613710.23
Aspen PhmcR.Hdg.	17450.00	17839.00	-2.2%	10632.41	Brit.Amer.Tobacco	56338.00	50757.00	11.0%	25052.27
Bidvest Group	19626.00	20178.00	-2.7%	14455.12	Prosus (JSE)	126762.00	114101.00	11.1%	173295.57
Woolworths Hdg.	5544.00	5700.00	-2.7%	10894.61	Discovery Ltd	11897.00	10650.00	11.7%	27970.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietcombank	97000.00	2.1%	-0.9%	142662.05	No Va Land Invest	104100.00	-2.3%	116.4%	150734.67
Hoang Huy Investment Financial Services	19150.00	1.9%	-4.0%	130.087.25	PetroVietnam Power Corp	10600.00	-1.9%	-22.1%	56.867.40
Ho Chi Minh City Devp	32900.00	1.2%	38.5%	107.072.93	Vincom Retail	27200.00	-1.6%	-13.4%	60985.93
Vietnam JSC Bank	32900.00	1.2%	22.9%	234.654.73	FPT Corp	92000.00	-1.3%	80.6%	309.296.83
Phat Dat Real Estate Development Corp	90900.00	1.2%	116.9%	228858.99	Khang Dien House Trading & Investment	38750.00	-1.3%	45.5%	146.308.86
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	92000.00	95000.00	-3.2%	307896.40	Vinamilk	86900.00	84000.00	3.5%	144731.95
Khang Dien House Trading and Investment JSC	38750.00	40500.00	-4.3%	145920.88	Vincom Retail	27200.00	25050.00	8.6%	60617.92
Phat Dat Real Estate Development Corp	90900.00	97500.00	-6.8%	230067.90	Hoang Huy Investment Financial Services	19150.00	17314.95	10.6%	131968.40
Petrovietnam Gas	89100.00	97500.00	-8.6%	28708.02	Bank for Inv. and Devp	40500.00	35203.97	15.0%	49948.65
Saigon Securities Inc	52400.00	59000.00	-11.2%	368592.08	Vietjet Aviation	114400.00	94300.00	21.3%	59556.64

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