

Daily Market Report

02 August 2021

JSE

JSE All-Share Index fell 0.85% to close at 68,970.75 points on Friday, as the Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 168.17 points, down by 0.29% on Friday with Total Senegal and Safca Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 0.16% to close at 38,547.08 points on Friday, as the Industrial and Banking sectors recorded gains.

EGX

EGX 30 Index increased by 0.63% and closed at 10,810.21 points on Sunday, as the market added LE 5.5 billion of market cap, amid Arab buying.

ESG

Casablanca ESG 10 Index was closed on Friday on account of Day of the King Ascension to the Throne.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.85%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.29%
NSE Nigerian Stock Exchange	▲ 0.16%
EGX Egyptian Stock Exchange	▲ 0.63%
ESG Casablanca Stock Exchange	↔ 0.00%

African Markets

Nigeria: NSE 30 Index increased by 0.42% and closed at 1,639.22 points on Friday. United Capital and Fidelity were the top gainers.

Egypt: EGX 30 Index increased by 0.63% and closed at 10,810.21 points on Sunday, as the market added LE 5.5 billion of market cap, amid Arab buying.

Kenya: NSE 20 Index decreased by 0.66% and closed at 1,974.29 points on Friday. East African Breweries Limited and Stanbic Holdings were the top losers.

South Africa: JSE Top 40 Index decreased by 0.86% to close at 62,852.28 points on Friday, as the Industrial and Resources sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.10
INTERBANK RATES	
OBB	7.50 ▼
Overnight	7.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased 1.02% to close at 7,393.11 points on Sunday, as Aldar Properties and Alpha Dhabi Holding recorded gains. MSCI UAE Index remained unchanged at 389.32 points.

Vietnam: VN-30 Index climbed 1.38% to close at 1,447.23 points on Friday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.96% to close at 1,005.19 points.

Saudi Arabia: Tadawul All Share Index was up by 0.49% to close at 11,066.93 points on Sunday, as gains in the Hotels & Tourism, Multi Investment and Financial Services sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 0.45% to close at 1,474.54 points.

India: Nifty 50 decreased by 0.10% to close at 15,763.05 points on Friday, as losses in the Metals, Banking and Oil & Gas sectors pushed the shares lower. MSCI India declined marginally 0.09% to close at 1,836.78 points.

News

Nigeria:

MTN Records N790.3bn Revenue in Q1 2021
Dangote Sugar Sustains Growth Despite Increasing Finance Cost
Cement: Dangote, BUA, Lafarge post 62% profit increase

Kenya:

Inflation ups 6.44% in July on Cooking Gas, Airtime, Electricity Price Hikes
Kenya drops China debt relief bid as banks resist
EABL buys extra Sh6bn stake in Dar subsidiary

Abu Dhabi:

UAE's real estate retail sector set to hit \$58 billion in sales by end of this year
ADIB sees rise in "digitally active" customers by 30% in six months
Economic revival drives H1 profits of UAE banks

Saudi Arabia:

Saudi Al Rajhi Bank and Riyad Bank see jump in Q2 net profit
Saudi central bank's net foreign assets rose by \$9bn in June 2021
Tammiah IPO sees more than 1,170% oversubscription

Egypt:

Egypt's stock exchange to lift limit on share price moves to 20% from September
Czech Export Support Bank allocates \$300M to Egyptian market
Egypt's M2 money supply up 18.1% year-on-year in June -CBE

South Africa:

Mboweni unleashes relief package, but warns SA's finances under pressure
Producer prices remain at five-year high last month
Eskom CEO Lays Out Funding Plan to Transition Away From Coal

India:

GST kitty up by Rs 1.2 lakh crore as economic activity picks up
Centre agrees to clear FY21 pending GST compensation instalments
Hindalco plans to invest Rs 8,000-10,000 cr in Hirakud, Silvassa and Mundra plants

Vietnam:

July CPI up by 0.62% month-on-month
Vietnam earns nearly 19 billion from textile exports in H1
PetroVietnam: H1 pre-tax profit surpasses plan by 165 percent

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,393.11	1.0%	1.0%	0.0%	46.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,810.21	0.6%	0.6%	0.0%	-0.3%	EGP/USD	15.71	0.0%	-0.2%
India	15,763.05	-0.1%	0.0%	0.0%	12.7%	INR/USD	74.42	0.2%	1.8%
Kenya	1,974.29	-0.7%	0.0%	0.0%	5.7%	KES/USD	108.60	0.0%	-0.5%
Nigeria	1,639.22	0.4%	0.0%	0.0%	-0.1%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,066.93	0.5%	0.5%	0.0%	27.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,852.28	-0.9%	0.0%	0.0%	15.6%	ZAR/USD	14.63	0.4%	-0.4%
Vietnam	1,447.23	1.4%	0.0%	0.0%	35.2%	VND/USD	22,955.00	-0.1%	-0.6%

MSCI Emerging Markets

MSCI Frontier	642.08	0.1%	0.0%	0.0%	12.3%	Brent Crude (\$)	76.33	0.4%	47.4%
MSCI Frontier 100	1,438.94	0.0%	0.0%	0.0%	14.4%	Gold (\$)	1,817.20	-1.0%	-4.1%
MSCI Emerging	1,277.81	-1.4%	0.0%	0.0%	-1.0%	Copper (\$)	9,728.00	-1.0%	25.3%
MSCI World (USD)	3,069.25	-0.7%	0.0%	0.0%	14.1%	Coffee (\$)	170.15	-1.9%	42.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	1.02	9.7%	13.3%	159.82	Axamansard	0.89	-8.2%	-15.2%	3.09
United Capital PLC	7.00	2.9%	67.9%	22.94	P Z Cussons	6.00	-4.8%	13.2%	3.12
Fidelity	2.40	2.1%	-4.8%	17.98	Wema	0.82	-3.5%	18.8%	0.86
UBN	5.30	1.9%	-0.9%	1.77	Ecobank	5.25	-1.9%	-12.5%	16.08
Dangote Sugar	18.50	1.6%	5.1%	60.46	Nigerian Breweries	57.50	-0.9%	2.7%	123.59
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Total	203.20	203.20	0.0%	40.27	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	351.06	UBN	5.30	4.65	14.0%	1.77
P Z Cussons	6.00	6.00	0.0%	3.12	Unilever	14.00	10.50	33.3%	6.80
Okomu Oil	110.00	110.00	0.0%	47.02	Ecobank	5.25	3.90	34.6%	16.08
Nestle	1540.00	1540.00	0.0%	299.03	Custodian	6.20	4.55	36.3%	11.60

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Methaq Right Issue Shares 2021	0.05	152.4%	430.0%	12.36	Gulf Cement	0.78	-7.0%	-7.0%	0.01
Methaq Takaful Ins.	1.06	10.9%	22.1%	11.20	National Bank of Ras Al Khaimah	3.90	-4.9%	0.0%	0.08
Emirates Telecom	24.06	5.5%	42.4%	81.28	Sharjah Cement	0.64	-3.9%	-16.3%	0.03
Ras Al Khaimah Cement	3.45	4.2%	339.5%	17.20	Reem Investments	28.00	-2.9%	27.3%	0.06
National Corp for Tourism and Hotels	3.00	3.5%	65.7%	0.03	Al Qudra Holding	2.91	-2.7%	164.5%	2.64
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 E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Ezz Steel	14.21	6.1%	32.4%	65.98	Egyptian for Tourism Resorts	2.21	-3.5%	55.6%	25.57
Tenth Of Ramadan Pharma. Ind & Diagnostic-Rameda	3.03	5.6%	-20.3%	28.07	Cleopatra Hospital Company	4.68	-1.9%	-1.7%	0.39
Ibsina Pharma	3.96	3.1%	-22.2%	22.54	Speed Medical	2.23	-1.8%	36.8%	28.03
Orascom Development Egypt	5.54	2.8%	13.1%	5.19	Fawry For Banking Tech. And Electronic Payment	18.86	-1.7%	-27.8%	10.60
Misr Fertilizers Production Company - Mopco	78.02	2.8%	32.7%	0.95	Eastern Company	11.65	-1.0%	-10.7%	2.90
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£)
Telecom Egypt	14.00	14.00	0.0%	7.16	GB AUTO	3.84	3.84	0.0%	5.32
Sidi Kerir Petrochemicals	12.62	12.62	0.0%	28.29	Medinet Nasr Housing	3.28	3.28	0.0%	6.29
Pioneers Holding	4.72	4.72	0.0%	12.56	Palm Hills Development	1.86	1.86	0.0%	5.57
Oriental Weavers	8.22	8.22	0.0%	3.37	T M G Holding	7.12	7.12	0.0%	6.92
MM Group For Industry And International Trade	7.34	7.36	-0.3%	10.14	Cairo For Investment And Real Estate Dev.	11.50	10.72	7.3%	14.83

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Sun Pharma Industries	773.55	10.0%	30.6%	26987.763	Bajaj Finance	6231.95	-2.6%	17.7%	8849.80
Tech Mahindra	1207.70	7.1%	24.1%	24787.61	Bajaj Finserv	14240.00	-2.5%	59.9%	5069.34
Cipla	920.55	4.2%	12.3%	5708.85	Hindalco Industries	447.80	-2.3%	86.2%	5863.81
Adani Ports And Sez.	675.00	2.3%	39.5%	9115.08	State Bank Of India	432.20	-2.1%	57.2%	15296.53
Shree Cement limited	28250.00	2.2%	17.6%	1280.14	UPL	805.00	-1.8%	72.6%	6259.95
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Infosys	1611.75	1623.40	-0.7%	10057.98	Britannia Inds.	3425.05	3317.30	3.2%	3375.92
Divi's Laboratories Limited	4893.45	4944.75	-1.0%	3229.39	Hero Motocorp	2771.00	2620.75	5.7%	2071.52
Ultratech Cement	7630.05	7730.00	-1.3%	1879.55	Reliance Industries	2037.00	1830.00	11.3%	10733.44
Sun Pharma Industries	773.55	783.75	-1.3%	26987.76	Maruti Suzuki India	6994.00	6118.95	14.3%	5022.73
Icici Bank	682.25	692.50	-1.5%	9913.43	Dr Reddys Lab	4711.00	4075.40	15.6%	6515.39

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	25.05	0.4%	4.4%	0.01	East African Breweries Limited	179.50	-2.7%	16.4%	14.27
Kenya Reinsurance Corporation Ltd	2.57	0.4%	10.8%	0.07	Stanbic Holdings	85.00	-2.3%	0.0%	0.04
KCB Group Plc	45.70	0.2%	19.9%	69.60	Nairobi Securities Exchange Plc	8.84	-1.6%	8.3%	0.12
Safaricom Plc	41.95	0.1%	22.5%	381.85	Centum Investment Company Plc	15.45	-1.3%	-3.7%	0.77
					Kengen Limited	4.41	-1.1%	-6.4%	1.01
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	48.90	49.45	-1.1%	91.64	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	5.24
KCB Group Plc	45.70	47.00	-2.8%	69.60	WPP Scangroup Plc	4.52	4.42	2.3%	2.33
Safaricom Plc	41.95	43.45	-3.5%	381.85	Centum Investment Company Plc	15.45	14.05	10.0%	0.77
The Cooperative Bank of Kenya Ltd	13.55	14.05	-3.6%	1.01	Kengen Limited	4.41	3.90	13.1%	1.01
Nation Media Group	25.00	26.05	-4.0%	0.37	Diamond Trust Bank Limited	65.75	57.50	14.3%	0.08

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
SEDCO Capital REIT Fund	14.96	9.0%	60.0%	39.36	Arabia Insurance Cooperative Co.	32.95	-4.5%	74.5%	37.45
Riyad REIT Fund	11.06	7.2%	30.1%	34.24	Yanbu Cement Co.	45.15	-3.3%	11.3%	26.18
Ataa Educational Co.	62.10	6.7%	57.2%	86.20	Gulf General Cooperative Insurance Co.	19.48	-2.2%	-21.6%	19.14
Alahli Takaful Co.	40.95	6.4%	17.3%	110.63	United Cooperative Assurance Co.	28.35	-2.1%	65.8%	11.57
Leejam Sports Co.	77.60	3.7%	0.4%	56.47	Bank Albilad	35.95	-2.0%	26.8%	63.38
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	72.90	72.90	0.0%	47.22	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	40.50	40.50	0.0%	21.75	BinDawood Holding Co.	109.60	105.60	3.8%	14.54
Walaa Cooperative Insurance Co.	24.64	24.64	0.0%	13.59	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	40.60	40.60	0.0%	26.70	Saudi Airlines Catering Co.	78.60	70.50	11.5%	19.64
United Electronics Co.	135.40	135.40	0.0%	12.53	Savola Group	43.10	36.60	17.8%	26.20

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Firstrand Ltd	5436.00	1.6%	6.5%	106849.47	Anglo American	65359.00	-2.7%	35.3%	125384.77
Bidvest Group	19992.00	1.5%	27.3%	20764.17	BHP Group	47367.00	-2.2%	21.7%	98269.09
ABSA Group	13643.00	1.5%	13.8%	41509.46	Anglogold Ashanti	29322.00	-2.0%	-14.4%	60258.32
Shoprite Limited	16040.00	1.4%	14.6%	31662.80	Investec Ltd	5645.00	-1.7%	49.9%	10794.28
Nedbank Group	16930.00	1.4%	30.8%	29932.10	Sasol Limited	21918.00	-1.6%	63.7%	43457.85
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)
Bidvest Group	19992.00	20178.00	-0.9%	20764.17	Brit.Amer.Tobacco	54748.00	50757.00	7.9%	42424.28
Aspen Phmc.R.Hdg.	18057.00	18335.00	-1.5%	21471.20	Vodacom Group	13064.00	12020.00	8.7%	42589.42
Mondi	40800.00	41490.00	-1.7%	30397.80	Discovery Ltd	11760.00	10650.00	10.4%	17294.95
RMB Holdings Ltd	148.00	151.00	-2.0%	194.09	Naspers Ltd	282200.00	247868.00	13.9%	502305.56
Woolworths Hdg.	5581.00	5700.00	-2.1%	23977.27	Spar Group	18372.00	16103.00	14.1%	12617.21

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Prosperity	61000.00	5.7%	87.7%	936.198.31	Vietjet Aviation	113000.00	-1.2%	-9.6%	60429.10
Refrigeration Electrical Engn	55000.00	5.0%	12.4%	104.359.60	Vinamilk	86100.00	-0.8%	-20.1%	379894.76
Masan Group Corp	134000.00	4.9%	52.0%	352942.74					
Phu Nhuan Jewelry	95800.00	3.0%	19.4%	93894.52					
Khang Dien House Trading & Investment	40700.00	2.3%	52.8%	311105.94					
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)
Khang Dien House Trading and Investment JSC	40700.00	41400.00	-1.7%	313866.19	Vinamilk	86100.00	84000.00	2.5%	379287.72
Masan Group Corp	134000.00	136600.00	-1.9%	355689.60	Vincom Retail	27650.00	25050.00	10.4%	139483.19
Phat Dat Real Estate Development Corp	92500.00	97500.00	-5.1%	342129.75	Hoang Huy Investment Financial Services JSC	19150.00	17314.95	10.6%	250669.67
Saigon Securities Inc	54600.00	59000.00	-7.5%	828194.64	Bank for Inv. and Devp	41100.00	35400.64	16.1%	83494.65
Petrovietnam Gas	89600.00	97500.00	-8.1%	47505.92	Vietjet Aviation	113000.00	94500.00	19.6%	60014.30

Email: research@fsdhgroup.com • www.fsdhgroup.com

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