

# Daily Market Report

## 03 August 2021

### JSE

JSE All-Share Index declined by 0.21% to close at 68,822.75 points on Monday, as the Industrial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 168.10 points, down by 0.04% on Monday with Safca Côte d'Ivoire and NEI-CEDA Côte d'Ivoire being the top losers.

### NSE

NSE All-Share increased by 0.15% to close at 38,604.72 points on Monday, as the Banking sector recorded gains.

### EGX

EGX 30 Index increased by 0.11% and closed at 10,821.88 points on Monday, as the market added LE 3.89 billion of market cap, amid Egyptian and Arab buying.

### ESG

Casablanca ESG 10 Index closed at 932.24 points on Monday, as it climbed 1.17%.

## African Markets

**Nigeria:** NSE 30 Index increased marginally by 0.09% and closed at 1,640.67 points on Monday. Julius Berger and MTNN were the top gainers.

**Egypt:** EGX 30 Index increased by 0.11% and closed at 10,821.88 points on Monday, as the market added LE 3.89 billion of market cap, amid Egyptian and Arab buying.

**Kenya:** NSE 20 Index decreased marginally by 0.08% and closed at 1,972.65 points on Monday. Total Kenya and Bamburi Cement were the top losers.

**South Africa:** JSE Top 40 Index decreased by 0.24% to close at 62,704 points on Monday, as the Industrial and Resources sectors recorded losses.

## Capital Markets

### JSE

Johannesburg Stock Exchange

▼ 0.21%

### BRVM

Bourse Régionale des Valeurs Mobilières

▼ 0.04%

### NSE

Nigerian Stock Exchange

▲ 0.15%

### EGX

Egyptian Stock Exchange

▲ 0.11%

### ESG

Casablanca Stock Exchange

▲ 1.17%

## Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.10

## INTERBANK RATES

OBB	5.25 ▼
Overnight	5.75 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX General increased 0.15% to close at 7,404.33 points on Monday, as Aldar Properties and First Abu Dhabi Bank recorded gains. MSCI UAE Index rose 1.73% to close at 396.05 points.

**Vietnam:** VN-30 Index increased marginally by 0.07% to close at 1,448.21 points on Monday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.21% to close at 1,007.28 points.

**Saudi Arabia:** Tadawul All Share Index rose 0.81% to close at 11,157.02 points on Monday, as gains in the Energy & Utilities, Financial Services and Telecoms & IT sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 1.10% to close at 1,490.78 points.

**India:** Nifty 50 increased by 0.77% to close at 15,885.15 points on Monday, as gains in the Auto, IT, Real Estate and Banking sectors pushed the shares higher. MSCI India rose 0.99% to close at 1,854.89 points.

## News

### Nigeria:

Nigeria's PMI hits 18-month high in July  
Naira strengthens to 512/\$1, banks sell dollar for N412  
NNPC plans policy guidelines for divesting IOC partners

### Kenya:

Kenya's Current Account Deficit Widens to 5.4% of GDP in June  
Long tenor bonds now in force on stabilised rates  
Kenya issues licences to foreign reinsurance brokers after law change

### Abu Dhabi:

Abu Dhabi reduces requirements for starting new business by 71%  
BDT and Mubadala strengthen ties with acquisition of Culligan  
Dubai to strengthen investment co-operation with GCC countries

### Saudi Arabia:

Saudi CMA approves Emaar EC's \$756m capital increase  
Saudi mortgage lending surges 27 percent in first half of 2021 - SAMA  
Saudi Arabia's real estate price index rises by 0.4% in Q2

### Egypt:

EGX develops new methodology for calculating shares' closing price  
5.85% decrease in Egypt's manufacturing, extractives index in May 2021  
Fawry's OGM approves to buy Banque Misr, CIB stake in Fawry Plus

### South Africa:

Banking sector unveils relief measures for customers affected by unrest  
SA's industrial production sinks to 14-month low in July  
Gold Fields' earnings surge on higher gold prices

### India:

HDFC profit flat at Rs 3,000cr in Q1  
Adani Wilmar plans to raise up to Rs 4,500 crore through IPO; files draft papers with Sebi  
PolicyBazaar files for Rs 6,017 crore IPO

### Vietnam:

Import-export value tops 373 billion USD  
Disbursed public investment up 5.6 percent in seven months  
Banks cut transaction fees to aid customers amid pandemic

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,404.33	0.2%	1.2%	0.2%	46.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,821.88	0.1%	0.7%	0.1%	-0.2%	EGP/USD	15.70	0.0%	-0.2%
India	15,885.15	0.8%	0.8%	0.8%	13.6%	INR/USD	74.34	-0.1%	1.7%
Kenya	1,972.65	-0.1%	-0.1%	-0.1%	5.6%	KES/USD	108.65	0.0%	-0.5%
Nigeria	1,640.67	0.1%	0.1%	0.1%	0.0%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,157.02	0.8%	1.3%	0.8%	28.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,704.00	-0.2%	-0.2%	-0.2%	15.3%	ZAR/USD	14.38	-1.7%	-2.1%
Vietnam	1,448.21	0.1%	0.1%	0.1%	35.2%	VND/USD	22,952.50	0.0%	-0.6%

## MSCI Emerging Markets

MSCI Frontier	643.99	0.3%	0.3%	0.3%	12.7%	Brent Crude (\$)	72.89	-4.5%	40.7%
MSCI Frontier 100	1,442.74	0.3%	0.3%	0.3%	14.7%	Gold (\$)	1,822.20	0.3%	-3.8%
MSCI Emerging	1,293.11	1.2%	1.2%	1.2%	0.1%	Copper (\$)	9,700.50	-0.3%	24.9%
MSCI World (USD)	3,077.11	0.3%	0.3%	0.3%	14.4%	Coffee (\$)	158.25	-7.0%	32.7%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Julius Berger	24.50	8.9%	37.6%	11.43	Dangote Sugar	17.50	-5.4%	-0.6%	52.88
Wema	0.84	2.4%	21.7%	3.29	Lafarge Africa	21.75	-5.0%	3.3%	37.41
MTNN	168.00	1.8%	-1.1%	153.57	Transnational Corporation	0.98	-3.9%	8.9%	40.01
Unilever	14.20	1.4%	2.2%	14.84	United Capital PLC	6.80	-2.9%	63.1%	21.86
Nascon	14.65	1.4%	1.0%	6.76	Sterling	1.51	-1.9%	-26.0%	3.37
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%	54.99	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	47.39	UBN	5.25	4.65	12.9%	4.66
P Z Cussons	6.00	6.00	0.0%	2.37	Sterling	1.51	1.13	33.6%	3.37
Okomu Oil	110.00	110.00	0.0%	15.59	Unilever	14.20	10.50	35.2%	14.84
Nestle	1540.00	1540.00	0.0%	106.98	Ecobank	5.30	3.90	35.9%	5.27

### 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	0.06	5.7%	460.0%	11.25	Al Qudra Holding	2.62	-10.0%	138.2%	1.37
National Bank of Ras Al Khaimah	4.09	4.9%	4.9%	0.51	Abu Dhabi Ship Building	4.40	-9.8%	88.8%	5.15
Abu Dhabi Commercial Bank	7.14	1.4%	15.2%	34.06	PALMS SPORTS	11.40	-3.9%	-13.6%	13.96
Dana Gas PJSC	0.89	1.3%	24.5%	19.18	Methaq Takaful Ins.	1.03	-2.8%	18.7%	4.87
Gulf Pharmaceutical Ind.	1.82	1.1%	36.8%	0.84	ESG EMIRATES STALLIONS GROUP	3.71	-2.1%	-10.8%	0.75
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	15.10	6.3%	40.7%	39.46	Speed Medical	2.13	-4.5%	30.7%	41.75
MM Group For Industry AndInternational Trade	7.70	4.9%	-1.8%	31.94	Egyptian for Tourism Resorts	2.15	-2.7%	51.4%	27.05
Alexandria Mineral Oils Company	3.80	4.4%	21.8%	41.87	Misr Fertilizers Production-Mopco	77.04	-1.3%	31.0%	2.63
Cairo For Investment And Real Estate Development	11.72	1.9%	-17.8%	0.45	Telecom Egypt	13.89	-0.8%	16.4%	14.97
Pioneers Holding	4.79	1.5%	19.2%	25.11	EFG-Hermes Holding Co.	11.47	-0.7%	-21.6%	10.08
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	13.89	13.89	0.0%	14.97	GB AUTO	3.89	3.89	0.0%	12.44
Sidi Kerir Petrochemicals	12.79	12.79	0.0%	40.57	Medinet Nasr Housing	3.28	3.28	0.0%	7.63
Pioneers Holding	4.79	4.79	0.0%	25.11	Palm Hills Dev. Company	1.86	1.86	0.0%	7.58
Oriental Weavers	8.28	8.28	0.0%	3.70	T M G Holding	7.10	7.10	0.0%	7.75
MM Group For Industry AndInternational Trade	7.70	7.70	0.0%	31.94	Commercial International Bank	57.81	54.00	7.1%	86.05

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Titan Company	1776.00	3.6%	13.3%	3024.940	UPL	790.35	-2.3%	69.5%	4924.48
Shree Cement limited	29260.10	3.5%	21.9%	2521.17	Tata Steel	1413.00	-1.5%	119.5%	13858.19
Bharat Petroleum	459.10	3.1%	20.5%	2261.36	Bajaj Finserv	14134.00	-0.6%	58.7%	3757.21
Adani Ports And Sez.	694.25	2.9%	43.5%	6158.74	Bajaj Finance	6202.45	-0.4%	17.1%	6298.28
Eicher Motors	2603.50	2.9%	2.9%	1785.37	Tech Mahindra	1206.00	-0.3%	23.9%	2870.93
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	1632.00	1634.75	-0.2%	9038.42	Britannia Inds.	3505.05	3317.30	5.7%	6610.49
Divi's Laboratories Limited	4915.40	4962.15	-0.9%	1773.40	Hero Motocorp	2787.80	2620.75	6.4%	1291.74
Titan Company	1776.00	1792.95	-0.9%	3024.94	Reliance Industries	2068.50	1830.00	13.0%	10424.00
Ultratech Cement	7649.00	7730.00	-1.0%	1551.04	Dr Reddys Lab	4701.50	4135.00	13.7%	3565.64
Wipro	595.00	601.80	-1.1%	2721.77	Maruti Suzuki India	7073.00	6125.05	15.5%	3063.85

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	182.25	1.5%	18.2%	0.84	Total Kenya Ltd	24.15	-3.6%	0.6%	0.07
Nairobi Securities Exchange Plc	8.90	0.7%	9.1%	0.06	Bamburi Cement Limited	37.50	-1.3%	-0.9%	50.27
Standard Chartered Bank Kenya Ltd	130.25	0.6%	-9.7%	0.20	Safaricom Plc	41.40	-1.3%	20.9%	139.75
WPP Scangroup Plc	4.53	0.2%	-24.5%	0.54	Kengen Limited	4.36	-1.1%	-7.4%	0.32
					British American Tobacco Kenya Ltd	460.25	-1.0%	27.5%	1.43
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%	10.56	WPP Scangroup Plc	4.53	4.42	2.5%	0.54
KCB Group Plc	45.70	47.00	-2.8%	5.77	Standard Chartered Bank Kenya Ltd	130.25	127.00	2.6%	0.20
The Cooperative Bank of Kenya Ltd	13.50	14.05	-3.9%	0.99	Centum Investment Company Plc	15.45	14.05	10.0%	0.98
Nation Media Group	25.00	26.05	-4.0%	1.09	Kengen Limited	4.36	3.90	11.8%	0.32
Safaricom Plc	41.40	43.45	-4.7%	139.75	Diamond Trust Bank Limited	65.50	57.50	13.9%	0.60

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Gas and Industrialization Co.	47.95	8.5%	57.2%	70.80	SEDCO Capital REIT Fund	14.14	-5.5%	51.2%	53.22
Abdulmohsen Alhokair Group for Tourism and Development	25.80	6.4%	21.8%	59.58	Saudi Company for Hardware	68.20	-2.9%	17.2%	31.00
Al Abdullatif Industrial Investment Co.	37.40	5.2%	144.4%	352.62	Sahara International Petrochemical Co.	32.75	-2.8%	89.1%	223.67
Al Rajhi Bank	117.00	3.4%	59.0%	652.81	AL Maather REIT Fund	9.48	-2.8%	6.5%	16.04
Al Rajhi REIT Fund	12.68	2.6%	30.7%	43.48	Tabuk Agricultural Development Co.	40.85	-2.5%	26.1%	114.89
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	71.90	71.90	0.0%	39.65	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	40.40	40.40	0.0%	18.35	BinDawood Holding Co.	109.00	105.60	3.2%	20.89
Walaa Cooperative Insurance Co.	24.48	24.48	0.0%	11.76	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	40.65	40.65	0.0%	18.35	Saudi Airlines Catering Co.	77.50	70.50	9.9%	20.25
United Electronics Co.	134.60	134.60	0.0%	12.43	Savola Group	43.10	36.60	17.8%	20.45

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	11130.00	5.6%	84.9%	103886.60	Mondi	39984.00	-2.0%	16.5%	12565.73
Anglo American	66259.00	1.4%	37.2%	67223.07	Redefine Properties	411.00	-1.9%	23.4%	2331.77
Vodacom Group	13238.00	1.3%	6.4%	19300.13	Anglogold Ashanti	28815.00	-1.7%	-15.9%	21146.09
Discovery Ltd	11900.00	1.2%	-22.5%	7653.76	Bid Corporation	31631.00	-1.6%	20.3%	14410.83
Multichoice Group	12258.00	0.8%	-8.5%	12758.29	Mr Price Group	21449.00	-1.6%	25.7%	14636.00
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	19998.00	20178.00	-0.9%	10255.75	Brit.Amer.Tobacco	54040.00	50757.00	6.5%	23494.05
MTN Group	11130.00	11424.00	-2.6%	103886.60	Vodacom Group	13238.00	12020.00	10.1%	19300.13
Shoprite Limited	15939.00	16384.00	-2.7%	8524.50	Discovery Ltd	11900.00	10650.00	11.7%	7653.76
Woolworths Hdg.	5524.00	5700.00	-3.1%	12719.56	Anglogold Ashanti	28815.00	25651.00	12.3%	21146.09
RMB Holdings Ltd	146.00	151.00	-3.3%	471.26	Naspers Ltd	279700.00	247868.00	12.8%	429653.04

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Petrovietnam Gas	93500.00	4.4%	11.4%	145888.69	Saigon Beer Alcohol Beverage Corp.	155100.00	-2.5%	-20.5%	37069.82
Mobile World Inv. Corp	169900.00	3.5%	42.9%	275265.33	Sai Gon Thuong Tin Commercial	29300.00	-2.0%	-9.8%	790176.74
Bank for Inv. and Devp	42550.00	3.5%	-11.2%	168479.82	Vietnam JSC Bank	33750.00	-1.9%	26.1%	851703.87
BaoViet Holdings	52300.00	2.4%	-20.8%	51393.71	Asia Commercial JS Bank	35550.00	-1.7%	58.1%	307636.33
Vietjet Aviation	115500.00	2.2%	29.1%	57601.26	Tien Phong Commercial Joint Stock Bank	34450.00	-1.6%	9.4%	229550.53
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)
Vietnam Prosperity	60400.00	60400.00	0.0%	461953.76	Hoa Phat Group	47250.00	47250.00	0.0%	1147168.87
Vietjet Aviation	115500.00	115500.00	0.0%	57601.26	Military Commercial Bank	28800.00	28800.00	0.0%	364817.30
Vingroup JSC	107500.00	107500.00	0.0%	182073.02	Vietnam National Petroleum Group	51500.00	51500.00	0.0%	45056.94
Vinhomes	108100.00	108100.00	0.0%	517260.00	PetroVietnam Power Corp	10750.00	10750.00	0.0%	88224.40
Techcombank	50800.00	50800.00	0.0%	716149.47	Sai Gon Thuong Tin Commercial	29300.00	29300.00	0.0%	790176.74

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