

Daily Market Report

04 August 2021

JSE

JSE All-Share Index declined by 0.17% to close at 68,705.75 points on Tuesday, as the Industrial sector recorded losses.

BRVM

BRVM Composite Index closed at 166.92 points, down by 0.70% on Tuesday with Solibra Côte d'Ivoire and Safca Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 0.81% to close at 38,917.99 points on Tuesday, as the Industrial sector remained unchanged.

EGX

EGX 30 Index decreased by 0.88% and closed at 10,726.33 points on Tuesday, as the market lost LE 7.18 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 933 points on Tuesday, as it increased marginally by 0.08%.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.17%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.70%

NSE Nigerian Stock Exchange ▲ 0.81%

EGX Egyptian Stock Exchange ▼ 0.88%

ESG Casablanca Stock Exchange ▲ 0.08%

African Markets

Nigeria: NSE 30 Index increased marginally by 0.09% and closed at 1,642.12 points on Tuesday. Unilever and MTNN were the top gainers.

Egypt: EGX 30 Index decreased by 0.88% and closed at 10,726.33 points on Tuesday, as the market lost LE 7.18 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index slipped by 0.03% and closed at 1,972.00 points on Tuesday. Kengen and British American Tobacco Kenya were the top losers.

South Africa: JSE Top 40 Index decreased by 0.26% to close at 62,543.44 points on Tuesday, as the Industrial sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.11

INTERBANK RATES

OBB	7.50 ▲
Overnight	8.00 ▲

Other Emerging Markets

Abu Dhabi: ADX General was up by 0.39% to close at 7,433.38 points on Tuesday, as Alpha Dhabi Holding and First Abu Dhabi Bank recorded gains. MSCI UAE Index increased by 0.48% to close at 397.96 points.

Vietnam: VN-30 Index climbed by 1.50% to close at 1,469.87 points on Tuesday, as the blue chip companies recorded gains. MSCI Vietnam jumped by 1.81% to close at 1,025.55 points.

Saudi Arabia: Tadawul All Share Index increased by 0.46% to close at 11,208.76 points on Tuesday, as gains in the Financial Services, Insurance and Media & Publishing sectors led shares higher. MSCI Tadawul 30 Index increased by 0.78% to close at 1,502.38 points.

India: Nifty 50 rose 1.55% to close at 16,130.75 points on Tuesday, as gains in the Fast Moving Consumer Goods, Auto and Green Energy sectors pushed the shares higher. MSCI India advanced by 1.46% to close at 1,881.98 points.

News

Nigeria:

Nigeria Gets \$3.35bn in IMF's Historic \$650bn SDR Allocation
UAE lifts ban on Nigerian transit passengers, others Thursday
Wema Bank's Total Assets Rises to N1.02trn in H1

Kenya:

UAE firm opens shop in Kenya to guide local SMEs, foreign investors
Dubai company to link NSE with top Africa bourses
EABL looks to pay dividend this year on high beer prices

Abu Dhabi:

Adnoc, Fertigllobe partner to sell UAE's 1st blue ammonia to Japan
UAE's TAQA, Emirates Steel partner for MENA's first green steel manufacturing
UAE's growth in non-oil economy reaches two-year high

Saudi Arabia:

Saudi PMI falls in July on weaker output growth, job creation
Spain's Acciona awarded \$400mln main contract for Jubail 3B IWP in Saudi Arabia
Audi Saudi Arabia reports 37% sales growth in H1

Egypt:

Egypt's July PMI slips lower as non-oil output, new orders recede
Egypt's universal health insurance attracts about \$1bnn in financial
Emaar Misr's profit hikes 103% in H1

South Africa:

StanChart resumes dividend as profit recovers
Pick n Pay relaunched and rebrands its delivery service
Mobile receives R2.8bn investment from Prosus

India:

Bharti Airtel net profit at Rs 284 crore in June quarter; revenue rises 15.3%
Adani Ports' net profit jumps 77% to Rs 1,342 crore in June quarter
Tata Consumer Products Q1 net profit down 42% to Rs 200 cr, revenue up 11%

Vietnam:

Industrial property segment sees rising FDI despite new COVID-19 outbreak
Ministry gives guidelines on forex activities on Vietnam's securities market
Vietnam sees 15.5% rise in exports in EU market

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,433.38	0.4%	1.6%	0.5%	47.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,726.33	-0.9%	-0.1%	-0.8%	-1.1%	EGP/USD	15.71	0.1%	-0.1%
India	16,130.75	1.5%	2.3%	2.3%	15.4%	INR/USD	74.29	-0.1%	1.7%
Kenya	1,972.00	-0.03%	-0.1%	-0.1%	5.5%	KES/USD	108.65	0.0%	-0.5%
Nigeria	1,642.12	0.1%	0.2%	0.2%	0.1%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,208.76	0.5%	1.8%	1.3%	29.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,543.44	-0.3%	-0.5%	-0.5%	15.0%	ZAR/USD	14.35	-0.2%	-2.3%
Vietnam	1,469.87	1.5%	1.6%	1.6%	37.3%	VND/USD	22,934.50	-0.1%	-0.6%

MSCI Emerging Markets

MSCI Frontier	646.54	0.4%	0.7%	0.7%	13.1%	Brent Crude (\$)	72.41	-0.7%	39.8%
MSCI Frontier 100	1,447.05	0.3%	0.6%	0.6%	15.0%	Gold (\$)	1,814.10	-0.4%	-4.3%
MSCI Emerging	1,294.18	0.1%	1.3%	1.3%	0.2%	Copper (\$)	9,541.50	-1.6%	22.9%
MSCI World (USD)	3,092.51	0.5%	0.8%	0.8%	15.0%	Coffee (\$)	158.25	0.0%	32.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.89	6.0%	29.0%	9.98	Transnational Corporation	0.93	-5.1%	3.3%	16.56
Airtel Africa	650.00	5.7%	-23.7%	101.41	Access	9.00	-2.2%	6.5%	56.74
Unilever	14.50	2.1%	4.3%	47.21	International Breweries	5.00	-2.0%	-16.0%	2.76
MTNN	171.00	1.8%	0.6%	376.82	Cap	20.50	-1.4%	2.5%	7.00
Axamansard	0.89	1.1%	-15.2%	3.12	FBNH	7.40	-1.3%	3.5%	42.89
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%	5.26	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	108.58	UBN	5.25	4.65	12.9%	3.24
P Z Cussons	6.00	6.00	0.0%	6.70	Sterling	1.51	1.13	33.6%	5.04
Okomu Oil	110.00	110.00	0.0%	18.34	Cap	20.50	15.25	34.4%	7.00
Nestle	1540.00	1540.00	0.0%	42.38	Ecobank	5.30	3.90	35.9%	21.80

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Ins. Co	5.30	7.9%	3.9%	4.78	Methaq Right Issue Shares 2021	0.05	-12.5%	390.0%	3.20
Arkan Building Materials	1.28	3.2%	45.5%	15.33	Abu Dhabi Ship Building	3.96	-10.0%	70.0%	20.05
Ras Al Khaimah Ceramics	2.38	3.0%	58.7%	8.52	Eshraq Investments	0.33	-6.9%	2.2%	14.26
Emirates Driving Co.	20.50	2.4%	53.7%	7.39	Gulf Cement	0.73	-6.2%	-12.8%	0.00
Ras Al Khaimah Cement	3.45	1.8%	339.5%	9.72	National Bank of Ras Al Khaimah	3.88	-5.1%	-0.5%	0.01
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
Easy Lease Motor Cycle Rental PSC	27.04	27.04	0.0%	6.10	Al Ain Ahlia Ins.	31.20	31.20	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	National Bank of Fujairah	4.98	4.98	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	National Bank of Umm Al Qaiwain	1.60	1.60	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	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	15.68	3.8%	46.1%	44.02	Orascom Development	5.06	-9.3%	3.3%	23.20
Pioneers Holding	4.93	2.9%	22.6%	52.39	Egyptian for Tourism Resorts	2.06	-4.2%	45.1%	30.09
GB AUTO	3.97	2.1%	19.6%	25.37	Cleopatra Hospital	4.57	-3.2%	-4.0%	22.28
Misr Fertilizers Production Company - Mopco	77.60	0.7%	32.0%	0.67	Raya Holding For Financial Investments	2.91	-3.0%	298.6%	1.71
Telecom Egypt	13.99	0.7%	17.3%	9.79	Fawry For Banking Tech & Electronic Payment	18.57	-3.0%	-28.9%	32.74
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	13.99	13.99	0.0%	9.79	GB AUTO	3.97	3.97	0.0%	25.37
Sidi Kerir Petrochemicals	12.58	12.58	0.0%	8.64	Medinet Nasr Housing	3.20	3.20	0.0%	22.44
Pioneers Holding	4.93	4.93	0.0%	52.39	Palm Hills Development	1.81	1.81	0.0%	4.93
Oriental Weavers	8.22	8.22	0.0%	2.59	T M G Holding	7.00	7.00	0.0%	5.78
MM Group For Industry And International Trade	7.61	7.61	0.0%	13.82	Commercial International Bank	57.74	54.00	6.9%	77.47

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Titan Company	1842.15	4.0%	17.5%	10916.847	Jsw Steel	740.85	-0.8%	91.3%	5115.27
HDFC	2555.00	3.8%	-0.1%	15044.53	Shree Cement limited	29198.00	-0.3%	21.6%	1357.99
Indusind Bank	1022.45	3.5%	14.2%	4494.01	Bajaj Auto	3830.00	-0.3%	11.2%	1561.63
Nestle India Limited	18298.05	3.3%	-0.5%	1140.95	UPL	789.40	-0.2%	69.3%	2570.06
Ultratech Cement	7849.35	2.7%	48.4%	2987.82	Tata Steel	1407.25	-0.2%	118.6%	12142.75
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	1657.00	1658.65	-0.1%	9074.67	Britannia Inds.	3563.20	3317.30	7.4%	4725.77
Divi's Laboratories Limited	5012.85	5019.90	-0.1%	2640.09	Hero Motocorp	2822.00	2620.75	7.7%	1488.91
Ultratech Cement	7849.35	7867.25	-0.2%	2987.82	Dr Reddys Lab	4720.50	4135.00	14.2%	2819.33
Icici Bank	690.05	692.50	-0.4%	6947.67	Reliance Industries	2090.00	1830.00	14.2%	11337.33
State Bank Of India	446.00	447.90	-0.4%	18078.54	Maruti Suzuki India	7193.00	6125.05	17.4%	3361.12

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	88.50	4.1%	4.1%	2.55	Kengen Limited	4.24	-2.8%	-10.0%	0.95
Centum Investment Company Plc	15.85	2.6%	-1.2%	0.32	British American Tobacco Kenya Ltd	450.00	-2.2%	24.7%	0.36
NCBA Group Plc	26.65	0.6%	-0.4%	0.98	East African Breweries Limited	180.00	-1.2%	16.7%	38.59
KCB Group Plc	45.95	0.5%	20.6%	53.42	Absa Bank Kenya	9.82	-1.0%	1.7%	1.23
Nairobi Securities Exchange Plc	8.94	0.4%	9.6%	0.05	Safaricom Plc	41.05	-0.8%	19.9%	140.95
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	49.00	49.45	-0.9%	7.19	Standard Chartered Bank Kenya Ltd	130.00	127.00	2.4%	59.85
KCB Group Plc	45.95	47.00	-2.2%	53.42	WPP Scangroup Plc	4.55	4.42	2.9%	0.26
The Cooperative Bank of Kenya Ltd	13.55	14.05	-3.6%	4.15	Kengen Limited	4.24	3.90	8.7%	0.95
Stanbic Holdings	88.50	92.00	-3.8%	2.55	Centum Investment Company Plc	15.85	14.05	12.8%	0.32
Nation Media Group	25.00	26.05	-4.0%	0.53	Diamond Trust Bank Limited	65.00	57.50	13.0%	0.13

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Eastern Province Cement Co.	53.80	5.7%	30.7%	57.63	Abdulmohsen Alhokair Group for Tourism & Devpt	24.70	-4.3%	16.6%	34.78
Al-Rajhi Company for Cooperative Insurance	98.60	5.5%	21.9%	80.28	Bank Aljazira	19.16	-3.7%	40.3%	446.14
Al Rajhi REIT Fund	13.30	4.9%	37.1%	36.15	Emaar The Economic City	12.96	-3.6%	40.7%	135.25
Arabia Insurance Cooperative Co.	34.50	3.9%	82.7%	66.33	Swicorp Wabel REIT Fund	8.65	-3.4%	16.7%	80.04
Saudi Ceramic Co.	64.00	3.7%	78.0%	69.20	National Gas and Industrialization Co.	46.50	-3.0%	52.5%	49.94
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	71.30	71.30	0.0%	23.54	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	40.45	40.45	0.0%	24.16	BinDawood Holding Co.	108.40	105.60	2.7%	11.34
Walaa Cooperative Insurance Co.	24.42	24.42	0.0%	9.09	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Wire Factories Co.	39.90	39.90	0.0%	12.70	Saudi Airlines Catering Co.	77.40	70.50	9.8%	8.52
United Electronics Co.	134.00	134.00	0.0%	14.55	Savola Group	42.95	36.60	17.3%	13.31

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Vodacom Group	13717.00	3.6%	10.3%	35605.04	Prosus	119635.00	-7.4%	-25.5%	158607.54
Capitec Bank	167919.00	2.8%	17.2%	39111.53	Naspers Ltd	260192.00	-7.0%	-13.8%	574848.17
Clicks Group	27221.00	2.7%	7.7%	22353.31	Redefine Properties	407.00	-1.0%	22.2%	2831.35
Woolworths Hdg.	5666.00	2.6%	43.3%	14304.94	Northam Platinum	22794.00	-0.2%	8.8%	25505.21
Investec Plc	5518.00	2.5%	50.6%	2846.07					
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	20335.00	20385.00	-0.2%	18867.61	Prosus	119635.00	114101.00	4.9%	158607.54
Shoprite Limited	16320.00	16384.00	-0.4%	19857.31	Naspers Ltd	260192.00	247868.00	5.0%	574848.17
Woolworths Hdg.	5666.00	5700.00	-0.6%	14304.94	Brit.Amer.Tobacco	54118.00	50757.00	6.6%	30816.03
MTN Group	11390.00	11471.00	-0.7%	54340.73	Discovery Ltd	11907.00	10650.00	11.8%	17879.93
Vodacom Group	13717.00	13935.00	-1.6%	35605.04	Anglogold Ashanti	29151.00	25651.00	13.6%	28725.51

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vingroup JSC	114500.00	6.5%	17.0%	826962.47	Vietnam National Petroleum Group	51200.00	-0.6%	-4.3%	63741.71
Vincom Retail	28300.00	2.9%	-73.7%	248.583.04	Petrovietnam Gas	93000.00	-0.5%	10.8%	90469.69
Saigon Securities Inc	56500.00	2.7%	169.7%	1,005.107.74					
Vinhomes	110900.00	2.6%	313.8%	1093693.22					
Ho Chi Minh City Devp	34900.00	2.1%	46.9%	126.926.13					
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	60800.00	60800.00	0.0%	526089.39	Hoa Phat Group JSC	47250.00	47250.00	0.0%	1335684.57
Vietjet Aviation	116000.00	116000.00	0.0%	66.285.28	Military Commercial Bank	29300.00	29300.00	0.0%	562,665,30
Vingroup JSC	114500.00	114500.00	0.0%	826962.47	Vietnam National Petroleum Group	51200.00	51200.00	0.0%	63741.71
Vinhomes	110900.00	110900.00	0.0%	1093693.22	PetroVietnam Power Corp	10800.00	10800.00	0.0%	56833.89
Techcombank	51800.00	51800.00	0.0%	1180897.61	Sai Gon Thuong Tin Commercial	29800.00	29800.00	0.0%	781199.82

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