

Daily Market Report

05 August 2021

JSE

JSE All-Share Index was up by 0.28% to close at 68,898.06 points on Wednesday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 167.73 points, up by 0.49% on Wednesday with Solibra Côte d'Ivoire and Bank of Africa - Benin being the top gainers.

NSE

NSE All-Share inched up by 0.03% to close at 38,927.83 points on Wednesday, as the Banking and Industrial sectors recorded gains.

EGX

EGX 30 Index inched down by 0.07% and closed at 10,718.89 points on Wednesday, as the market lost LE 720.63 million of market cap, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 929.25 points on Wednesday, as it declined by 0.40%.

African Markets

Nigeria: NSE 30 Index increased marginally by 0.08% and closed at 1,643.44 points on Wednesday. Presco and Access were the top gainers.

Egypt: EGX 30 Index inched down by 0.07% and closed at 10,718.89 points on Wednesday, as the market lost LE 720.63 million of market cap, amid Egyptian selling.

Kenya: NSE 20 Index increased marginally by 0.08% and closed at 1,973.58 points on Wednesday. Nation Media Group and Bamburi Cement were the top gainers.

South Africa: JSE Top 40 Index increased by 0.33% to close at 62,750.03 points on Wednesday, as the Industrial and Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.28%

BRVM
Bourse Régionale des Valeurs Mobilières ▲ 0.49%

NSE
Nigerian Stock Exchange ▲ 0.03%

EGX
Egyptian Stock Exchange ▼ 0.07%

ESG
Casablanca Stock Exchange ▼ 0.40%

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.11

INTERBANK RATES

OBB	8.50 ▲
Overnight	9.00 ▲

Other Emerging Markets

Abu Dhabi: ADX General declined by 0.38% to close at 7,405.09 points on Wednesday, as International Holding Company and First Abu Dhabi Bank recorded losses. MSCI UAE Index fell 0.42% to close at 396.27 points.

Vietnam: VN-30 Index increased by 0.16% to close at 1,472.20 points on Wednesday, as the blue chip companies recorded gains. MSCI Vietnam inched up by 0.05% to close at 1,026.04 points.

Saudi Arabia: Tadawul All Share Index declined by 0.41% to close at 11,162.38 points on Wednesday, as losses in the Agriculture & Food, Multi Investment and Real Estate Development sectors pushed the shares lower. MSCI Tadawul 30 Index was down by 0.18% to close at 1,499.74 points.

India: Nifty 50 increased by 0.79% to close at 16,258.80 points on Wednesday, as gains in the Banking, Carbon and Public Sector Undertakings sectors pushed the shares higher. MSCI India was up by 0.32% to close at 1,887.93 points.

News

Nigeria:

FEC approves \$11bn for Lagos-Calabar coastal rail, \$1.48bn refineries' repairs
FG Appoints Eight Transaction Advisers for \$6.2bn Eurobonds
CBN issues guidelines for payments service holding companies

Kenya:

Kenya's Economic Activity Eases in July
Private sector lending up 8pc as demand increases
Kenya Remits KSh 82.7 Billion to China, Resuming its Debt Repayment

Abu Dhabi:

Wary of inflation, UAE investors plan to rejig portfolios
UAE: New national programme to reduce energy demand by 40%
IDB activates new programme for Abu Dhabi's industrial sector

Saudi Arabia:

Saudi Arabia raises September crude prices to Asia for a 2nd month
Saudi British Bank swings to \$245mln Q2 net profit
Saudi venture capital market grows by 65%

Egypt:

EGX launches its Treasury Bonds Index
Egypt's net foreign reserves rise slightly to \$40.6bln in July - CBE
Egypt's treasury bears LE 73.3M as part of vehicle replacement initiative

South Africa:

Business activity fell to its lowest in July
Gauteng sets up R500m fund to help businesses hit by unrest and Covid-19
Naspers backs insurer Naked in SA investment push

India:

KM Birla steps down as non-exec chairman of Voda Idea
SBI reports its highest ever quarterly profit of Rs 6,504cr
RBI extends current a/c rules implementation deadline to Oct 31

Vietnam:

July industrial production hit hard by pandemic
Over 32.5 trillion VND raised through G-bond auctions in July
Ministry proposes 30 percent decrease in 2021 corporate income tax

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,405.09	-0.4%	1.2%	0.2%	46.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,718.89	-0.1%	-0.2%	-0.8%	-1.2%	EGP/USD	15.70	-0.1%	-0.2%
India	16,258.80	0.8%	3.1%	3.1%	16.3%	INR/USD	74.19	-0.1%	1.5%
Kenya	1,973.58	0.1%	0.0%	0.0%	5.6%	KES/USD	108.70	0.0%	-0.5%
Nigeria	1,643.44	0.1%	0.3%	0.3%	0.2%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,162.38	-0.4%	1.4%	0.9%	28.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,750.03	0.3%	-0.2%	-0.2%	15.4%	ZAR/USD	14.36	0.1%	-2.2%
Vietnam	1,472.20	0.2%	1.7%	1.7%	37.5%	VND/USD	22,947.50	0.1%	-0.6%

MSCI Emerging Markets

MSCI Frontier	646.30	0.0%	0.7%	0.7%	13.1%	Brent Crude (\$)	70.38	-2.8%	39.5%
MSCI Frontier 100	1,446.85	0.0%	0.5%	0.5%	15.0%	Gold (\$)	1,814.50	0.02%	-4.3%
MSCI Emerging	1,303.99	0.8%	2.0%	2.0%	1.0%	Copper (\$)	9,466.00	-0.8%	21.9%
MSCI World (USD)	3,085.83	-0.2%	0.5%	0.5%	14.7%	Coffee (\$)	155.41	1.0%	30.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Presco	72.60	3.7%	2.3%	44.74	Guinness	31.50	-0.9%	65.8%	23.77
Axamansard	0.91	2.2%	-13.3%	1.27	Unilever	14.40	-0.7%	3.6%	8.81
Access	9.20	2.2%	8.9%	42.35	FBNH	7.35	-0.7%	2.8%	24.40
FCMB	3.06	2.0%	-8.1%	27.13	Stanbic IBTC	40.70	-0.5%	-7.6%	25.98
Sterling	1.53	1.3%	-25.0%	78.77					
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%	2.48	Transcorp Hotels	3.57	3.25	9.8%	0.00
Seplat Petroleum	770.00	770.00	0.0%	100.32	UBN	5.25	4.65	12.9%	0.87
P Z Cussons	6.00	6.00	0.0%	2.34	Cap	20.50	15.25	34.4%	0.64
Okomu Oil	110.00	110.00	0.0%	1.98	Sterling	1.53	1.13	35.4%	78.77
Nestle	1540.00	1540.00	0.0%	63.40	Ecobank	5.30	3.90	35.9%	0.44

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
National Takaful Company	0.92	15.0%	-7.9%	0.05	Abu Dhabi Ship Building	3.85	-2.8%	65.2%	9.40
Ras Al Khaimah Ceramics	2.73	14.7%	82.0%	33.91	Emirates Driving Co.	20.00	-2.4%	49.9%	0.60
Gulf Cement	0.81	10.4%	-3.7%	0.02	Ras Al Khaimah Cement	3.37	-2.3%	329.3%	2.62
RAK Co. for White Cement & Construction	0.96	10.3%	13.1%	0.00	Abu Dhabi National Ins. Co	5.20	-1.9%	2.0%	1.13
National Marine Dredging	10.96	5.4%	82.4%	23.95	Sudatel Telecom	0.38	-1.6%	-9.2%	0.04
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£)
Pioneers Holding	5.19	5.3%	29.1%	52.33	Cairo For Investment And Real Estate Dev.	11.49	-2.2%	-19.4%	4.70
Speed Medical	2.19	4.3%	34.4%	36.29	Fawry For Banking Tech& Electric Pay	18.16	-2.2%	-30.5%	36.66
MM Group For Industry AndInternational Trade	7.83	2.9%	-0.1%	34.49	Cleopatra Hospital	4.48	-2.0%	-5.9%	14.62
Telecom Egypt	14.25	1.9%	19.4%	55.63	Tenth Of Ramadan Pharma. Ind. & Diagnostic-Rameda	2.96	-1.3%	-22.1%	4.21
Egyptian Financial Group-HermesHolding Company	11.53	1.1%	-21.2%	11.73	Raya Holding For Fin Investments	2.88	-1.0%	294.5%	1.08
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	14.25	14.25	0.0%	55.63	GB AUTO	3.93	3.93	0.0%	4.96
Sidi Kerir Petrochemicals	12.60	12.60	0.0%	7.66	Medinet Nasr Housing	3.20	3.20	0.0%	4.56
Pioneers Holding	5.19	5.19	0.0%	52.33	Palm Hills Dev.	1.80	1.80	0.0%	3.18
Oriental Weavers	8.17	8.17	0.0%	6.42	T M G Holding	6.97	6.97	0.0%	4.75
MM Group For Industry AndInternational Trade	7.83	7.83	0.0%	34.49	Commercial International Bank	57.69	54.00	6.8%	24.64

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HDFC	2672.00	4.6%	4.4%	25429.442	Grasim Industries	1553.00	-2.5%	67.4%	1956.50
Kotak Mahindra Bank	1751.20	3.9%	-12.2%	12125.39	Titan Company	1801.00	-2.1%	14.9%	3716.34
Icici Bank	712.05	3.1%	33.1%	20393.85	Tata Motors	298.10	-1.8%	62.1%	7882.85
State Bank Of India	456.15	2.2%	65.9%	59043.92	Adani Ports And Sez.	693.50	-1.6%	43.4%	9912.81
Hdfc Bank	1465.50	2.2%	2.0%	16131.80	Hindalco Industries	441.70	-1.6%	83.6%	3856.20
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
SBI Life Insurance	1139.50	1148.00	-0.7%	2090.68	Hero Motocorp	2807.90	2620.75	7.1%	867.74
Icici Bank	712.05	717.40	-0.7%	20393.85	Britannia Inds.	3576.30	3317.30	7.8%	1706.84
Wipro	596.40	604.00	-1.3%	2696.14	Reliance Industries	2105.00	1830.00	15.0%	12782.77
Larsen & Toubro	1623.50	1647.15	-1.4%	3364.31	Dr Reddys Lab	4772.00	4135.00	15.4%	5278.04
Tech Mahindra	1219.00	1237.30	-1.5%	2361.82	Maruti Suzuki India	7120.00	6125.05	16.2%	3455.36

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nation Media Group	25.75	3.0%	66.7%	0.07	Nairobi Securities Exchange Plc	8.62	-3.6%	5.6%	0.31
Bamburi Cement Limited	38.50	2.7%	1.7%	0.06	Diamond Trust Bank Limited	64.00	-1.5%	-14.7%	15.55
Stanbic Holdings	90.00	1.7%	5.9%	0.27	NCBA Group Plc	26.25	-1.5%	-1.9%	0.44
Standard Chartered Bank Kenya Ltd	132.00	1.5%	-8.5%	5.94	Centum Investment Company Plc	15.65	-1.3%	-2.5%	0.80
Kenya Power & Lighting Limited	1.40	1.4%	-18.1%	1.05	Kengen Limited	4.19	-1.2%	-11.0%	0.47
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	49.10	49.45	-0.7%	16.25	WPP Scangroup Plc	4.50	4.42	1.8%	0.15
KCB Group Plc	46.20	47.00	-1.7%	7.22	Standard Chartered Bank Kenya Ltd	132.00	127.00	3.9%	5.94
Stanbic Holdings	90.00	92.00	-2.2%	0.27	Kengen Limited	4.19	3.90	7.4%	0.47
Nation Media Group	25.75	26.50	-2.8%	0.07	Diamond Trust Bank Limited	64.00	57.50	11.3%	15.55
The Cooperative Bank of Kenya Ltd	13.45	14.05	-4.3%	1.12	Centum Investment Company Plc	15.65	14.05	11.4%	0.80

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tanmiah Food Co.	87.10	30.0%	30.0%	2.59	Savola Group	41.00	-4.5%	-3.5%	130.47
Arabia Insurance Cooperative Co.	36.55	5.9%	93.6%	89.94	Swicorp Wabel REIT Fund	8.31	-3.9%	12.1%	93.32
Abdulmohsen Alhokair Group for Tourism and Development	26.00	5.3%	22.8%	164.66	SEDCO Capital REIT Fund	13.42	-3.9%	43.5%	7.84
Alandalus Property Co.	31.00	3.7%	46.4%	129.67	Riyad REIT Fund	10.44	-3.3%	22.8%	7.25
Al Abdullatif Industrial Investment Co.	37.50	2.6%	145.1%	165.04	Baazeem Trading Co.	140.00	-3.3%	55.2%	36.54
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	71.00	71.00	0.0%	19.84	Tanmiah Food Co.	87.10	87.10	0.0%	2.59
Zamil Industrial Investment Co.	40.55	40.55	0.0%	16.37	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Wala Cooperative Insurance Co.	24.48	24.48	0.0%	10.24	BinDawood Holding Co.	107.40	105.60	1.7%	12.96
United Wire Factories Co.	39.20	39.20	0.0%	8.37	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	134.00	134.00	0.0%	6.21	Saudi Airlines Catering Co.	76.90	70.50	9.1%	10.66

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Prosus (JSE)	123400.00	3.1%	-23.2%	206520.88	Vodacom Group	13334.00	-2.8%	7.2%	23495.93
Naspers Ltd	267501.00	2.8%	-11.4%	355504.01	Woolworths Hdq.	5580.00	-1.5%	41.1%	20590.50
Gold Fields	14638.00	1.6%	6.4%	31286.94	Old Mutual Limited	1290.00	-1.5%	8.5%	10892.95
Northam Platinum	23149.00	1.6%	10.5%	21250.46	Spar Group	18378.00	-1.2%	-3.0%	11315.33
Sasol Limited	22267.00	1.6%	66.3%	28581.16	MTN Group	11255.00	-1.2%	87.0%	44156.69
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)
Anglo American	68448.00	69068.09	-0.9%	74493.33	Brit.Amer.Tobacco	53777.00	50757.00	5.9%	32964.66
Bidvest Group	20285.00	20484.00	-1.0%	11947.91	Naspers Ltd	267501.00	247868.00	7.9%	355504.01
Shoprite Limited	16148.00	16402.00	-1.5%	17866.03	Prosus	123400.00	114101.00	8.1%	206520.88
MTN Group	11255.00	11471.00	-1.9%	44156.69	Vodacom Group	13334.00	12020.00	10.9%	23495.93
Woolworths Hdq.	5580.00	5700.00	-2.1%	20590.50	Discovery Ltd	11924.00	10650.00	12.0%	11940.19

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Sai Gon Thuong Tin Commercial	30650.00	2.9%	-5.6%	1468828.56	Vincom Retail	27900.00	-1.4%	-74.1%	113641.51
Vietnam National Petroleum Group	52300.00	2.2%	-2.2%	107629.95	Masan Group Corp	136000.00	-1.3%	54.3%	216672.39
BaoViet Holdings	53800.00	2.1%	-18.5%	62130.91	Khang Dien House Trading & Investment	40600.00	-0.9%	52.4%	188660.95
No Va Land Invest	107500.00	1.9%	123.5%	619.030.05	Asia Commercial JS Bank	35500.00	-0.8%	57.9%	302.572.25
Tien Phong Commercial Joint Stock Bank	35100.00	1.6%	11.4%	331.530.15	Bank for Inv. and Devp	43000.00	-0.8%	-10.2%	92.485.75
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	60500.00	60500.00	0.0%	487.756.64	Hoa Phat Group JSC	47500.00	47500.00	0.0%	1158806.87
Vietjet Aviation	116200.00	116200.00	0.0%	58164.06	Military Commercial Bank	29700.00	29700.00	0.0%	516433.12
Vingroup JSC	114000.00	114000.00	0.0%	331873.51	Vietnam National Petroleum Group	52300.00	52300.00	0.0%	107629.95
Vinhomes	110500.00	110500.00	0.0%	456.824.98	PetroVietnam Power Corp	10850.00	10850.00	0.0%	78565.85
Techcombank	52000.00	52000.00	0.0%	1002066.95	Sai Gon Thuong Tin Commercial	30650.00	30650.00	0.0%	1468828.56

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