

Daily Market Report

09 August 2021

JSE

JSE All-Share Index increased by 0.44% to close at 68,673.94 points on Friday, as all the sectors recorded gains.

BRVM

BRVM Composite Index closed at 169.32 points, up by 0.59% on Friday with Sicom Côte d'Ivoire and Crown Siem Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched up by 0.02% to close at 38,810.75 points on Friday, as the Oil & gas sector recorded gains.

EGX

EGX 30 Index increased by 0.14% and closed at 10,738.67 points on Sunday, as the market added LE 4.03 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index closed at 938.72 points on Friday, as it rose 0.46%.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.44%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.59%
NSE Nigerian Stock Exchange	▲ 0.02%
EGX Egyptian Stock Exchange	▲ 0.14%
ESG Casablanca Stock Exchange	▲ 0.46%

African Markets

Nigeria: NSE 30 Index inched up by 0.04% and closed at 1,637.41 points on Friday. Sterling and Ecobank were the top gainers.

Egypt: EGX 30 Index increased by 0.14% and closed at 10,738.67 points on Sunday, as the market added LE 4.03 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index slipped by 0.02% and closed at 1,974.46 points on Friday. Nation Media Group and Kenya Reinsurance Corporation were the top losers.

South Africa: JSE Top 40 Index increased by 0.50% to close at 62,509.23 points on Friday, as all the sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.11
INTERBANK RATES	
OBB	20.00 ▲
Overnight	20.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General advanced by 1.11% to close at 7,501.38 points on Sunday, as International Holding Company and First Abu Dhabi Bank recorded gains. MSCI UAE Index remained unchanged at 397.36 points.

Vietnam: VN-30 Index fell by 0.65% to close at 1,476.79 points on Friday, as the blue chip companies recorded losses. MSCI Vietnam decreased by 0.17% to close at 1,031.72 points.

Saudi Arabia: Tadawul All Share Index marginally increased by 0.05% to close at 11,215.33 points on Sunday, as gains in the Insurance, Hotels & Tourism and Retail sectors pushed the shares higher. MSCI Tadawul 30 Index decreased by 0.16% to close at 1,503.99 points.

India: Nifty 50 declined by 0.35% to close at 16,238.20 points on Friday, as losses in the Real Estate, Metals and Consumer Durables sectors pushed the shares lower. MSCI India decreased by 0.36% to close at 1,883.20 points.

News

Nigeria:

Hollyfrontier to Acquire 97-year-old 115,000bpd Refinery for \$2.6bn
Manufacturing records N6.99tn growth, resists harsh environment
Dangote-Owned Sugar Firm Plans \$1 Billion Expansion by 2023

Kenya:

UK retains Kenya travel ban as Covid cases surge
Banks tax payments fall 23pc on Covid-19
Kenya Re's Full-Year Profit Drops by 66% to KSh533.7 mn

Abu Dhabi:

Abu Dhabi's IHC gets a Dh4.36b profit boost
UAE firms unveil plan to produce region's first 'green steel'
Dubai crypto platform BitOasis sees over \$1.5bn trading in H1

Saudi Arabia:

Saudi Aramco's Q2 net profit surges to \$25.5bn on oil price, demand recovery
Saudi Arabia's financial wealth grows to \$1 tn despite challenges from pandemic
Saudi's largest private healthcare provider's net profit up nearly 70%

Egypt:

Egypt, Germany seal 12 development finance deals -- Minister
Misr Fertilizers Production Co's profit up 16% in H1
Egypt's central bank issues LE 11B in T-bills Sunday

South Africa:

Manufacturing sector expected to continue improving capacity
Standard Bank launches business banking awards worth R4.5 mn of grant funds
AngloGold shares slide as pandemic hits earnings

India:

Sebi amends rules to empower independent directors
RBI sees inflation rising, but holds rates to push growth
Forex reserves surge by \$9.42 billion to all-time high of \$620.57 billion

Vietnam:

Industrial production index up 7.9 percent
Vietnam's overseas investment rises by 2-3 times
Property prices spike despite COVID-19 pandemic

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,501.38	1.1%	1.1%	1.5%	48.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,738.67	0.1%	0.1%	-0.7%	-1.0%	EGP/USD	15.71	0.0%	-0.2%
India	16,238.20	-0.3%	0.0%	3.0%	16.1%	INR/USD	74.15	0.0%	1.5%
Kenya	1,974.46	-0.02%	0.0%	0.0%	5.7%	KES/USD	108.80	0.0%	-0.4%
Nigeria	1,637.41	0.04%	0.0%	-0.1%	-0.2%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,215.33	0.1%	0.1%	1.3%	29.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,509.23	0.5%	0.0%	-0.5%	14.9%	ZAR/USD	14.68	2.1%	-0.1%
Vietnam	1,476.79	-0.7%	0.0%	2.0%	37.9%	VND/USD	22,927.50	0.0%	-0.7%

MSCI Emerging Markets

MSCI Frontier	649.26	0.0%	0.0%	1.1%	13.6%	Brent Crude (\$)	70.70	-0.8%	36.5%
MSCI Frontier 100	1,454.37	0.0%	0.0%	1.1%	15.6%	Gold (\$)	1,763.10	-2.5%	-7.0%
MSCI Emerging	1,292.53	-0.6%	0.0%	1.2%	0.1%	Copper (\$)	9,468.00	-0.2%	21.9%
MSCI World (USD)	3,098.06	-0.1%	0.0%	0.9%	15.2%	Coffee (\$)	155.52	0.1%	30.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	3.92	9.8%	8.9%	1.27	Wema	0.87	-2.2%	26.1%	10.75
Transnational Corporation	0.95	2.2%	5.6%	12.36	Axamansard	0.90	-1.1%	-14.3%	0.53
Sterling	1.55	1.3%	-24.0%	4.85	FCMB	3.10	-0.6%	-6.9%	37.99
Ecobank	5.40	0.9%	-10.0%	27.29	Fidelity	2.39	-0.4%	-5.2%	12.73
Guinness	31.70	0.6%	66.8%	18.64	Zenith	24.35	-0.2%	-1.8%	146.51
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%	8.32	UBN	5.25	4.65	12.9%	0.72
Seplat Petroleum	770.00	770.00	0.0%	18.44	Transcorp Hotels	3.92	3.25	20.6%	1.27
P Z Cussons	6.00	6.00	0.0%	2.72	Cap	20.50	15.25	34.4%	0.06
Okomu Oil	110.00	110.00	0.0%	0.84	Custodian	6.20	4.55	36.3%	0.16
Nestle	1540.00	1540.00	0.0%	52.30	Sterling	1.55	1.13	37.2%	4.85

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Waha Capital	1.75	4.8%	45.8%	13.99	METHAQ RIGHT ISSUE SHARES 2021	0.03	-26.7%	230.0%	2.69
Easylease motorcycle rentals	29.00	3.6%	64.8%	5.93	Sharjah Cement	0.63	-10.0%	-16.7%	0.00
RAK Properties PJSC	0.71	3.5%	47.5%	24.77	Al Qudra Holding	2.11	-8.7%	91.8%	1.36
International Holding	136.50	3.4%	225.0%	348.20	Emirates Driving Co.	19.00	-4.5%	42.4%	8.97
ZEE STORE PRJSC	10.30	3.0%	-1.9%	10.42	RAK Co. for White Cement & Construction	0.89	-4.2%	4.9%	0.33
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	28.00	28.00	0.0%	5.62	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%	28.56	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£)
Citadel Capital - Common Shares	1.30	3.4%	-9.5%	34.79	Pioneers Holding	5.06	-2.5%	25.9%	34.34
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	3.02	3.1%	-20.5%	5.46	Cleopatra Hospital Company	4.52	-2.0%	-5.0%	0.95
MM Group For Industry AndInternational Trade	7.97	2.7%	1.7%	26.45	Egyptian for Tourism Resorts	2.06	-1.4%	45.1%	9.06
Abou Kir Fertilizers	19.97	1.8%	-3.4%	8.69	Eastern Company	11.33	-1.1%	-13.1%	1.47
Credit Agricole Egypt	24.47	1.7%	-15.7%	13.84	Palm Hills Dev. Company	1.79	-0.7%	31.0%	5.52
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	14.45	14.45	0.0%	9.20	GB AUTO	3.89	3.89	0.0%	2.29
Sidi Kerir Petrochemicals	12.64	12.64	0.0%	2.87	Medinet Nasr Housing Palm Hills Development Company	3.24	3.24	0.0%	14.40
Pioneers Holding	5.06	5.06	0.0%	34.34	T M G Holding	1.79	1.79	0.0%	5.52
Oriental Weavers	8.29	8.29	0.0%	1.53	Commercial International Bank	7.08	7.08	0.0%	9.81
MM Group For Industry AndInternational Trade	7.97	7.97	0.0%	26.45		57.90	54.00	7.2%	20.37

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	1027.00	2.9%	14.8%	7800.521	Cipla	912.05	-3.5%	11.2%	8938.08
Adani Ports And Sez.	710.00	2.4%	46.8%	12442.94	Reliance Industries	2090.00	-2.1%	5.3%	16116.36
Indian Oil	106.00	2.0%	16.5%	972.71	Shree Cement limited	28420.00	-1.9%	18.4%	878.95
Tech Mahindra	1268.00	1.6%	30.3%	4916.74	Ultratech Cement	7550.00	-1.4%	42.8%	1892.43
Tata Consumer products ltd.	780.00	1.5%	32.2%	6153.33	Tata Steel	1428.00	-1.3%	121.9%	13927.98
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tech Mahindra	1268.00	1273.00	-0.4%	4916.74	Hero Motocorp	2836.20	2670.10	6.2%	1262.78
Infosys	1652.10	1679.90	-1.7%	6206.40	Britannia Inds.	3606.00	3317.30	8.7%	930.55
SBI Life Insurance	1151.25	1175.70	-2.1%	1890.63	Maruti Suzuki India	7108.00	6270.15	13.4%	3684.07
Hcl Technologies	1049.25	1073.00	-2.2%	12225.77	Reliance Industries	2090.00	1830.00	14.2%	16116.36
Tata Consumer products ltd.	780.00	798.35	-2.3%	6153.33	Dr Reddys Lab	4769.00	4135.00	15.3%	1910.35

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	92.50	2.8%	8.8%	4.06	Nation Media Group	24.75	-5.2%	60.2%	2.26
Safaricom Plc	42.10	2.1%	22.9%	137.58	Kenya Reinsurance Corporation Ltd	2.58	-3.7%	11.2%	1.69
Total Kenya Ltd	24.75	1.9%	3.1%	0.02	WPP Scangroup Plc	4.46	-0.9%	-25.7%	0.22
Kenya Power & Lighting Limited	1.40	1.4%	-18.1%	0.20	Bamburi Cement Limited	38.00	-0.8%	0.4%	0.72
Equity Group Holdings Plc	50.00	1.2%	36.8%	51.64	Centum Investment Company Plc	15.55	-0.6%	-3.1%	1.28
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)
KCB Group Plc	46.75	47.00	-0.5%	47.18	WPP Scangroup Plc	4.46	4.42	0.9%	0.22
Stanbic Holdings	92.50	93.00	-0.5%	4.06	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	1.59
Equity Group Holdings Plc	50.00	50.75	-1.5%	51.64	Kengen Limited	4.21	3.90	7.9%	0.48
The Cooperative Bank of Kenya Ltd	13.65	14.05	-2.8%	8.46	Centum Investment Company Plc	15.55	14.05	10.7%	1.28
Safaricom Plc	42.10	43.45	-3.1%	137.58	Diamond Trust Bank Limited	65.75	57.50	14.3%	0.52

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Bupa Arabia for Cooperative Insurance Co.	154.00	10.0%	26.0%	38.54	Arab Sea Information System	145.00	-3.6%	69.6%	78.99
Leejam Sports Co.	83.80	10.0%	8.4%	95.92	Tanmiah Food Co.	101.00	-2.7%	50.7%	145.14
The Company for Cooperative Insurance	93.00	9.5%	16.7%	177.17	Mouwasat Medical Services Co.	191.00	-2.3%	38.4%	17.08
Al-Rajhi Company for Cooperative Insurance	106.20	6.0%	31.3%	95.24	Al Hassan Ghazi Ibrahim Shaker Co.	30.65	-2.2%	90.1%	85.56
Saudi Re for Cooperative Reinsurance Co.	19.46	5.0%	28.7%	95.78	Sahara International Petrochemical Co.	32.70	-1.8%	88.8%	136.96
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%	19.80	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	40.60	40.60	0.0%	29.49	BinDawood Holding Co.	107.20	105.60	1.5%	35.89
United Wire Factories Co.	39.35	39.35	0.0%	6.38	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	134.80	134.80	0.0%	10.36	Saudi Airlines Catering Co.	78.60	70.50	11.5%	16.12
United Cooperative Assurance Co.	29.15	29.15	0.0%	9.87	Savola Group	40.90	36.60	11.7%	21.66

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
BHP Group (JSE)	46550.00	2.0%	19.6%	37336.50	Anglogold Ashanti	24718.00	-12.0%	-27.8%	117182.50
Anglo American (JSE)	66999.00	1.9%	38.7%	65800.19	Gold Fields	13155.00	-6.8%	-4.4%	44028.86
Naspers Ltd	267517.00	1.4%	-11.4%	674256.00	Impala Platinum	24771.00	-2.7%	22.7%	79473.77
Prosus (JSE)	123689.00	1.3%	-23.0%	214417.48	Multichoice Group	12233.00	-1.8%	-8.7%	13157.73
Aspen PhmcR.Hdg.	17900.00	1.2%	42.8%	12669.80	Vodacom Group	13291.00	-1.3%	6.8%	8475.27
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)
MTN Group	11390.00	11505.00	-1.0%	31388.33	Anglogold Ashanti	24718.00	24537.00	0.7%	117182.50
Bidvest Group	20431.00	20705.00	-1.3%	11579.70	Brit.Amer.Tobacco (JSE)	53776.00	50757.00	5.9%	17150.62
FirstRand Ltd	5730.00	5820.00	-1.5%	41779.93	Gold Fields	13155.00	12193.00	7.9%	44028.86
Woolworths Hdg.	5921.00	6018.00	-1.6%	28824.54	Naspers Ltd	267517.00	247868.00	7.9%	674256.00
Capitec Bank	170852.00	173749.00	-1.7%	36176.03	Prosus (JSE)	123689.00	114101.00	8.4%	214417.48

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vinhomes	113900.00	2.0%	325.0%	1271952.58	Sai Gon Thuong Tin Commercial	30300.00	-2.4%	-6.7%	949825.36
PetroVietnam Power Corp	11000.00	1.9%	-19.1%	147044.71	Vietnam Prosperity	60600.00	-1.9%	-51.5%	732224.11
Khang Dien House Trading & Investment	41400.00	1.0%	55.4%	238246.71	Saigon Securities Inc	56400.00	-1.9%	169.2%	938117.25
Vietnam National Petroleum Group	52900.00	1.0%	-1.1%	91189.35	Vietnam Rubber Group JSC	34200.00	-1.9%	14.2%	196507.02
Vietjet Aviation	117400.00	0.8%	31.2%	55438.79	Petrovietnam Gas	92400.00	-1.5%	10.1%	122137.17
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	60600.00	60600.00	0.0%	732224.11	Hoa Phat Group JSC	48400.00	48400.00	0.0%	978798.94
Vietjet Aviation	117400.00	117400.00	0.0%	55438.79	Military Commercial Bank	29650.00	29650.00	0.0%	408286.59
Vingroup JSC	113300.00	113300.00	0.0%	345492.46	Vietnam National Petroleum Group	52900.00	52900.00	0.0%	91189.35
Vinhomes	113900.00	113900.00	0.0%	1271952.58	PetroVietnam Power Corp	11000.00	11000.00	0.0%	147044.71
Techcombank	51800.00	51800.00	0.0%	844236.01	Sai Gon Thuong Tin Commercial	30300.00	30300.00	0.0%	949825.36

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

DISCLAIMER

This publication is produced by FSDH Capital LTD solely for the information of users who are expected to make their own investment decisions without undue reliance on any information or opinions contained herein. The opinions contained in the report should not be interpreted as an offer to sell, or a solicitation of any offer to buy any investment. FSDH Capital LTD may invest substantially in securities of companies using information contained herein and may also perform or seek to perform investment services for companies mentioned herein. Whilst every care has been taken in preparing this document, no responsibility or liability is accepted by any member of the FSDH Capital LTD for actions taken as a result of information provided in this publication.