

Daily Market Report

11 August 2021

JSE

JSE All-Share Index rose 1.35% to close at 69,602.06 points on Tuesday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 168.92 points, down by 0.07% on Tuesday with Safca Côte d'Ivoire and Air Liquide Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 1.58% to close at 39,176.62 points on Tuesday, as the Oil & Gas sector recorded gains.

EGX

EGX 30 Index increased by 0.49% and closed at 10,853.83 points on Tuesday, as the market added LE 2.13 billion of market cap, amid foreign buying.

ESG

Casablanca ESG 10 Index was closed on Tuesday on account of Islamic New Year.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.35%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.07%
NSE Nigerian Stock Exchange	▲ 1.58%
EGX Egyptian Stock Exchange	▲ 0.49%
ESG Casablanca Stock Exchange	↔ 0.00%

African Markets

Nigeria: NSE 30 Index increased by 0.46% and closed at 1,633.53 points on Tuesday. MTNN and United Capital were the top gainers.

Egypt: EGX 30 Index increased by 0.49% and closed at 10,853.83 points on Tuesday, as the market added LE 2.13 billion of market cap, amid foreign buying.

Kenya: NSE 20 Index decreased by 0.10% and closed at 1,975.02 points on Tuesday. WPP Scangroup and Total Kenya were the top losers.

South Africa: JSE Top 40 Index jumped by 1.65% to close at 63,541.21 points on Tuesday, as the Industrial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.12
INTERBANK RATES	
OBB	13.00 ↔
Overnight	13.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased by 0.19% to close at 7,558.73 points on Tuesday, as First Abu Dhabi Bank and Alpha Dhabi recorded losses. MSCI UAE Index was down by 0.25% to close at 400.15 points.

Vietnam: VN-30 Index declined by 0.23% to close at 1,494.41 points on Tuesday, as the blue chip companies recorded losses. MSCI Vietnam declined by 0.15% to close at 1,044.35 points.

Saudi Arabia: Tadawul All Share Index increased by 0.91% to close at 11,299.87 points on Tuesday, as gains in the Hotels & Tourism, Financial Services and Retail sectors pushed the shares higher. MSCI Tadawul 30 Index rose 1.25% to close at 1,522.93 points.

India: Nifty 50 increased by 0.13% to close at 16,280.10 points on Tuesday as gains in the Technology, IT and Banking sectors pushed the shares higher. MSCI India inched up by 0.06% to close at 1,882.83 points.

News

Nigeria:

Dangote Cement lists N150bn bonds on NGX
Nigeria's VAT hits N1tn in six months, says NBS
Airlines groan as aviation fuel price hits N315/litre

Kenya:

KRA nets Sh1 billion from tax amnesty scheme
Kenya pins hopes of tourism revival on mass vaccination
Beer, fuel, boda boda price to rise in new tax

Abu Dhabi:

Adnoc Distribution posts Dh1.15b in H1 profit
Emaar Malls' H1 profits jump 80% as consumer spending grows
Etihad cuts loss; on track to recovery as operations grow in H1

Saudi Arabia:

Record-breaking quarter for issuance of foreign investor licenses in Saudi Arabia
Budget figures indicate Saudi Arabia's robust economic progress
Saudi Arabia's Chemanol to raise capital by SR551m via rights issue

Egypt:

Egypt's annual inflation records 6.1% during July, rises 1% monthly
Egypt's annual core inflation records 4.6% in July: CBE
Egypt approves \$1.1B in loans, \$140.7 in grants in 1st session of 2nd legislative term

South Africa:

Absa, African Rainbow launch renewable energy platform with R6.5bn gross assets
Manufacturing production slowed by 12.5 percent year-on-year in June
Standard, Absa forecast sharp earnings gains in six months to June 30

India:

India's retail inflation likely cooled to 5.78% in July
States' borrowing cost falls to 2-month low at 6.87%
Exports up over 50% to \$7.41 bn during August 1-7

Vietnam:

State budget collection up 15.6 percent in seven months
Việt Nam's overseas investment more than doubles in seven months: FIA
Hoa Phat's steel sales reached 600,000 tonnes in July

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,558.73	-0.2%	1.9%	2.2%	49.8%	AED/USD	3.67	0.0%	0.0%
Egypt	10,853.83	0.5%	1.2%	0.4%	0.1%	EGP/USD	15.70	-0.1%	-0.2%
India	16,280.10	0.1%	0.3%	3.3%	16.4%	INR/USD	74.43	0.2%	1.9%
Kenya	1,975.02	-0.1%	0.0%	0.0%	5.7%	KES/USD	109.05	0.2%	-0.1%
Nigeria	1,633.53	0.5%	-0.2%	-0.3%	-0.4%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,299.87	0.9%	0.8%	2.1%	30.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	63,541.21	1.7%	1.7%	1.1%	16.8%	ZAR/USD	14.82	0.3%	0.9%
Vietnam	1,494.41	-0.2%	1.2%	3.3%	39.6%	VND/USD	22,888.00	-0.2%	-0.8%

MSCI Emerging Markets

MSCI Frontier	653.40	0.1%	0.6%	1.8%	14.3%	Brent Crude (\$)	70.63	2.3%	36.4%
MSCI Frontier 100	1,464.46	0.3%	0.7%	1.8%	16.4%	Gold (\$)	1,731.70	0.3%	-8.6%
MSCI Emerging	1,300.33	0.5%	0.6%	1.8%	0.7%	Copper (\$)	9,520.50	1.6%	22.6%
MSCI World (USD)	3,099.49	0.1%	0.0%	1.0%	15.2%	Coffee (\$)	157.07	1.9%	31.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Airtel Africa	715.00	10.0%	-16.1%	83.42	Wema	0.82	-2.4%	18.8%	7.84
MTNN	172.10	2.4%	1.3%	489.33	Flour Mills	29.20	-1.8%	12.3%	29.75
United Capital PLC	6.99	2.0%	67.6%	20.85	Cap	20.20	-1.5%	1.0%	19.35
Ecobank	5.50	1.9%	-8.3%	131.02	Axamansard	0.89	-1.1%	-15.2%	1.57
FCMB	3.15	1.6%	-5.4%	30.33	Lafarge Africa	21.80	-0.9%	3.6%	76.52
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%	9.09	UBN	5.25	4.65	12.9%	0.44
Seplat Petroleum	770.00	770.00	0.0%	1.57	Transcorp Hotels	3.92	3.25	20.6%	0.17
P Z Cussons	6.00	6.00	0.0%	3.12	Cap	20.20	15.25	32.5%	19.35
Okomu Oil	110.00	110.00	0.0%	6.38	Sterling	1.53	1.13	35.4%	4.54
Nestle	1540.00	1540.00	0.0%	7.21	Unilever	14.30	10.50	36.2%	6.70

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Bank of Sharjah PJSC	0.55	4.8%	-12.7%	0.05	METHAQ RIGHT ISSUE SHARES 2021	0.002	-90.0%	-80.0%	0.89
Easylease motorcycle rentals	30.50	3.4%	73.3%	5.37	Ras Al Khaimah Cement	2.96	-9.8%	277.1%	14.26
Abu Dhabi National for Building Materials	0.31	3.3%	19.7%	0.00	National Bank of Umm Al Qaiwain	1.45	-9.4%	-27.5%	2.24
Sharjah Cement	0.65	2.7%	-14.5%	0.01	Abu Dhabi Ship Building	3.52	-6.6%	51.1%	5.43
Manazel PJSC	0.39	2.4%	11.4%	3.35	ZEE STORE PRJSC	10.40	-3.7%	-1.0%	11.69
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	30.50	30.50	0.0%	5.53	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	Sharjah Group Co.	0.80	0.80	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	0.0%	0.00	Sharjah Insurance	1.44	1.44	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£)
Egyptian for Tourism Resorts	2.12	3.4%	49.3%	16.23	Sidi Kerir Petrochemicals	11.78	-6.4%	26.5%	55.91
Heliopolis Housing	5.00	2.7%	-18.0%	40.02	Ezz Steel	15.05	-3.5%	40.3%	21.11
T M G Holding	7.20	1.8%	9.6%	18.36	Orascom Development Egypt	5.03	-2.9%	2.7%	15.83
Commercial International Bank(Egypt)	59.71	1.7%	0.9%	92.33	Abou Kir Fertilizers	19.70	-2.0%	-4.7%	7.80
ELSWEDY ELECTRIC	8.84	1.4%	-9.9%	33.83	Citadel Capital - Common Shares	1.28	-1.7%	-11.1%	8.09
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	15.07	15.07	0.0%	73.63	GB AUTO	3.91	3.91	0.0%	2.95
Sidi Kerir Petrochemicals	11.78	11.78	0.0%	55.91	Medinet Nasr Housing	3.25	3.25	0.0%	51.17
Pioneers Holding	4.90	4.90	0.0%	10.19	Palm Hills Dev. Company	1.78	1.78	0.0%	7.54
Oriental Weavers	8.38	8.38	0.0%	9.08	T M G Holding	7.20	7.20	0.0%	18.36
MM Group For Industry AndInternational Trade	7.76	7.76	0.0%	7.76	Cleopatra Hospital Company	4.46	4.16	7.2%	0.45

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	621.90	3.8%	22.0%	20968.970	Shree Cement limited	27129.00	-4.1%	13.0%	3362.38
Tech Mahindra	1323.00	2.8%	35.9%	8299.30	Jsw Steel	720.50	-3.6%	86.1%	4696.01
HDFC	2671.00	1.8%	4.4%	12492.43	Tata Steel	1372.15	-2.8%	113.2%	11786.89
Kotak Mahindra Bank	1810.00	1.6%	-9.3%	8329.54	Hindalco Industries	425.05	-2.2%	76.7%	4496.30
Mahindra & Mahindra	785.65	1.4%	9.0%	3705.70	Power Grid Corp Of India	172.80	-2.1%	-9.0%	1547.30
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	1674.15	1680.00	-0.3%	11463.05	Hero Motocorp	2801.90	2674.15	4.8%	1617.08
Tech Mahindra	1323.00	1329.70	-0.5%	8299.30	Britannia Inds.	3633.25	3317.30	9.5%	906.26
Bharti Airtel	621.90	628.00	-1.0%	20968.97	Maruti Suzuki India	7006.00	6270.15	11.7%	2508.54
Hcl Technologies	1061.75	1073.00	-1.0%	6218.15	Reliance Industries	2085.00	1830.00	13.9%	11524.92
Sun Pharm.Industries	790.90	804.35	-1.7%	4471.03	Dr Reddys Lab	4766.95	4135.00	15.3%	2960.38

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	89.75	3.8%	5.6%	0.95	WPP Scangroup Plc	4.43	-4.1%	-26.2%	2.08
Bamburi Cement Limited	38.80	2.1%	2.5%	94.07	Total Kenya Ltd	24.05	-3.6%	0.2%	0.25
The Cooperative Bank of Kenya Ltd	13.80	1.1%	10.4%	107.58	Nairobi Securities Exchange Plc	8.78	-3.5%	7.6%	0.04
British American Tobacco Kenya Ltd	450.00	1.0%	24.7%	0.36	Centum Investment Company Plc	15.50	-1.6%	-3.4%	1.59
Kenya Reinsurance Corporation Ltd	2.60	0.8%	12.1%	5.94	NCBA Group Plc	25.50	-1.4%	-4.7%	8.13
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	50.25	50.75	-1.0%	27.59	WPP Scangroup Plc	4.43	4.32	2.5%	2.08
Safaricom Plc	42.95	43.45	-1.2%	164.26	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	96.68
KCB Group Plc	46.45	47.00	-1.2%	5.74	Kengen Limited	4.14	3.90	6.2%	2.12
The Cooperative Bank of Kenya Ltd	13.80	14.05	-1.8%	107.58	Centum Investment Company Plc	15.50	14.05	10.3%	1.59
Stanbic Holdings	89.75	93.00	-3.5%	0.95	Diamond Trust Bank Limited	65.25	57.50	13.5%	0.10

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.	107.40	9.9%	60.3%	442.25	The Company for Cooperative Insurance	95.30	-4.5%	19.6%	59.37
Ataa Educational Co.	65.50	9.9%	65.8%	92.20	Bupa Arabia for Coop. Insurance	162.00	-4.1%	32.6%	94.32
National Company for Learning and Education	68.80	8.2%	31.8%	79.85	The Mediterranean and Gulf Insurance and Reinsurance	25.50	-3.4%	7.5%	29.42
Bank Albilad	41.20	5.2%	45.3%	170.65	Alahli Takaful Co.	38.70	-3.1%	10.9%	15.23
Alkhaleej Training and Education Co.	31.00	4.0%	38.0%	141.08	Al Hammadi Company for Dev. and Investment	41.65	-2.9%	44.1%	74.56
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	70.80	70.80	0.0%	38.28	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	59.60	59.60	0.0%	445.93	BinDawood Holding Co.	107.40	105.60	1.7%	7.54
Zamil Industrial Investment Co.	39.85	39.85	0.0%	13.67	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	133.40	133.40	0.0%	23.22	Savola Group	41.10	36.60	12.3%	30.87
United Cooperative Assurance Co.	29.05	29.05	0.0%	7.52	Saudi Airlines Catering Co.	79.80	70.50	13.2%	52.51

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	296000.00	10.6%	-2.0%	836924.61	Anglogold Ashanti	22727.00	-8.1%	-33.6%	86773.69
Prosus (JSE)	136413.00	10.3%	-15.1%	287994.17	Gold Fields	12531.00	-4.7%	-8.9%	52195.30
Mondi (JSE)	41785.00	2.3%	21.8%	13684.21	Northam Platinum	21375.00	-3.8%	2.0%	40615.09
Anglo American (JSE)	68180.00	1.8%	41.1%	126922.39	Bidvest Group	19818.00	-3.0%	26.2%	25039.92
BHP Group (JSE)	47347.00	1.7%	21.7%	50774.45	Impala Platinum	24071.00	-2.8%	19.2%	81874.67
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)
Mondi (JSE)	41785.00	41918.00	-0.3%	13684.21	Anglogold Ashanti	22727.00	22600.00	0.6%	86773.69
Clicks Group	27800.00	28113.00	-1.1%	23466.48	Gold Fields	12531.00	12193.00	2.8%	52195.30
Anglo American (JSE)	68180.00	69068.09	-1.3%	126922.39	Brit.Amer.Tobacco (JSE)	54416.00	50757.00	7.2%	54939.32
MTN Group	11354.00	11505.00	-1.3%	51230.70	Vodacom Group	13213.00	12020.00	9.9%	21273.22
Capitec Bank	173078.00	175737.00	-1.5%	57209.89	Discovery Ltd	12108.00	10650.00	13.7%	23796.81

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Petrovietnam Gas	96000.00	3.2%	14.4%	211.053.59	Masan Group Corp	138500.00	-1.8%	57.1%	141.556.37
Vinamilk	89400.00	1.9%	-17.4%	532316.22	No Va Land Invest	104600.00	-1.3%	117.5%	330177.35
Vietnam National Petroleum Group	53800.00	1.7%	0.6%	219.120.19	Khang Dien House Trading & Investment	41900.00	-1.1%	57.3%	235089.00
PetroVietnam Power Corp	11250.00	0.9%	-17.3%	98199.39	BaoViet Holdings	53400.00	-0.9%	-19.1%	37306.65
Vietcombank	99000.00	0.7%	396.2%	153786.59	Vincom Retail	28350.00	-0.9%	-73.7%	126.135.27
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%	376352.77	Military Commercial Bank	29650.00	29650.00	0.0%	411.276.15
Vietjet Aviation	118700.00	118700.00	0.0%	58971.72	Vietnam National Petroleum Group	53800.00	53800.00	0.0%	219.120.19
Vingroup JSC	113000.00	113000.00	0.0%	322.364.52	PetroVietnam Power Corp	11250.00	11250.00	0.0%	98199.39
Vinhomes	117000.00	117000.00	0.0%	909.254.58	Sai Gon Thuong Tin Commercial	30600.00	30600.00	0.0%	746385.87
Techcombank	52300.00	52300.00	0.0%	642.292.38	Tien Phong Commercial Joint Stock Bank	36000.00	36000.00	0.0%	122.239.19

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.