

Daily Market Report

12 August 2021

JSE

JSE All-Share Index inched up 0.02% to close at 69,617.19 points on Wednesday, as the Resources sector recorded gains.

BRVM

BRVM Composite Index closed at 169.88 points, up by 0.52% on Wednesday with Solibra Côte d'Ivoire and Bank of Africa - Senegal being the top gainers.

NSE

NSE All-Share increased by 0.69% to close at 39,448.46 points on Wednesday, as the Banking, Oil & Gas and Insurance sectors recorded gains.

EGX

EGX 30 Index increased by 0.28% and closed at 10,884.50 points on Wednesday, as the market added LE 2.34 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index closed at 940.26 points on Wednesday, as it increased by 0.49%.

African Markets

Nigeria: NSE 30 Index increased marginally by 0.09% and closed at 1,634.99 points on Wednesday. Ecobank and Sterling were the top gainers.

Egypt: EGX 30 Index increased by 0.28% and closed at 10,884.50 points on Wednesday, as the market added LE 2.34 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index decreased by 0.65% and closed at 1,962.25 points on Wednesday. Stanbic Holdings and Nairobi Securities Exchange were the top losers.

South Africa: JSE Top 40 Index decreased marginally by 0.08% to close at 63,488.73 points on Wednesday, as the Industrial and Financial sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.02%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.52%

NSE

Nigerian Stock Exchange ▲ 0.69%

EGX

Egyptian Stock Exchange ▲ 0.28%

ESG

Casablanca Stock Exchange ▲ 0.49%

Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.12

INTERBANK RATES

OBB	17.00 ▲
Overnight	17.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General increased by 0.47% to close at 7,594.35 points on Wednesday, as International Holding Company and Aldar Properties recorded gains. MSCI UAE Index fell 0.44% to close at 398.39 points.

Vietnam: VN-30 Index declined by 0.43% to close at 1,487.91 points on Wednesday, as the blue chip companies recorded losses. MSCI Vietnam declined by 0.52% to close at 1,038.88 points.

Saudi Arabia: Tadawul All Share Index was up by 0.22% to close at 11,325.10 points on Wednesday, as gains in the Transport, Financial Services and Energy & Utilities sectors pushed the shares higher. MSCI Tadawul 30 Index increased by 0.44% to close at 1,529.61 points.

India: Nifty 50 inched up 0.01% to close at 16,282.25 points on Wednesday, as gains in the Metals, Power and Oil & Gas sectors pushed the shares higher. MSCI India increased marginally by 0.09% to close at 1,884.60 points.

News

Nigeria:

Naira tumbles to 515 as dollar scarcity persists
FG reintroduces toll plazas, Nigerians to pay N500, N200 per trip
Nigeria's VAT hits N1tn in six months, says NBS

Kenya:

CIC Insurance posts Sh259 million profit in half-year
State to take all public tenders to online platform
Start-ups registration surges on Covid job cuts

Abu Dhabi:

UAE's Dana Gas H1 net profit swings to \$139mln on higher oil prices
Aldar Properties posts record Dh2.35B in development sales
Abu Dhabi TAQA's H1 net income jumps by 42% to \$790mln

Saudi Arabia:

Saudi construction, industry investment soars in Q1
Saudi Arabia targets \$42bln from asset sales, PPP by 2025
Jazadco's H1 profits leap 740%

Egypt:

Bahrain's ABC triples Egypt market share with BLOM unit takeover
Ready-to-wear garment exports hit \$918m in 6 months in 2021
Beltone Financial Holding turns to profitability in H1

South Africa:

SA records agricultural trade surplus of R22bn
SA business mood drops to nine-month low after riots
Fortress launches R900m sustainability-linked bonds on JSE to scale-up

India:

ITC may demerge hotels biz, enlist IT arm
Agriculture sector records new business registration growth at 103% in FY21
L&T sells 99 mw-hydropower project to ReNew Power for Rs 958 cr

Vietnam:

Oil and gas companies post mixed business results despite higher oil prices
Kien Giang develops marine aquaculture towards sustainable development
Electronics exports forecast to be robust this year

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,594.35	0.5%	2.4%	2.7%	50.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,884.50	0.3%	1.5%	0.7%	0.4%	EGP/USD	15.68	-0.1%	-0.3%
India	16,282.25	0.01%	0.3%	3.3%	16.5%	INR/USD	74.44	0.0%	1.9%
Kenya	1,962.25	-0.6%	-0.6%	-0.6%	5.0%	KES/USD	109.15	0.1%	0.0%
Nigeria	1,634.99	0.1%	-0.1%	-0.3%	-0.3%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,325.10	0.2%	1.0%	2.3%	30.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	63,488.73	-0.1%	1.6%	1.0%	16.8%	ZAR/USD	14.70	-0.8%	0.1%
Vietnam	1,487.91	-0.4%	0.8%	2.8%	39.0%	VND/USD	22,810.00	-0.3%	-1.2%

MSCI Emerging Markets

MSCI Frontier	653.83	0.1%	0.7%	1.8%	14.4%	Brent Crude (\$)	71.44	1.1%	37.9%
MSCI Frontier 100	1,467.97	0.2%	0.9%	2.0%	16.7%	Gold (\$)	1,753.30	1.2%	-7.5%
MSCI Emerging	1,297.58	-0.2%	0.4%	1.5%	0.5%	Copper (\$)	9,512.00	-0.1%	22.5%
MSCI World (USD)	3,109.97	0.3%	0.4%	1.3%	15.6%	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 ₦)
Ecobank	5.80	5.5%	-3.3%	97.99	Wema	0.76	-7.3%	10.1%	3.82
Airtel Africa	750.00	4.9%	-12.0%	370.88	Flour Mills	29.00	-0.7%	11.5%	104.20
Sterling	1.59	3.9%	-22.1%	22.24	UBA	7.55	-0.7%	-12.7%	83.39
Fidelity	2.45	1.2%	-2.8%	24.38	United Capital PLC	6.95	-0.6%	66.7%	16.18
Transnational Corporation	0.96	1.1%	6.7%	19.34	FCMB	3.14	-0.3%	-5.7%	48.21
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%	5.02	UBN	5.25	4.65	12.9%	0.41
Seplat Petroleum	770.00	770.00	0.0%	16.28	Transcorp Hotels	3.92	3.25	20.6%	0.17
P Z Cussons	6.00	6.00	0.0%	0.66	Cap	20.20	15.25	32.5%	0.81
Okomu Oil	110.00	110.00	0.0%	11.24	Unilever	14.30	10.50	36.2%	1.44
Nestle	1540.00	1540.00	0.0%	20.06	Custodian	6.25	4.55	37.4%	3.56

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Easylease motorcycle rentals	34.70	13.8%	97.2%	5.43	Methaq Right Issue Shares 2021	0.001	-50.0%	-90.0%	0.20
Zee Stores	11.80	13.5%	12.4%	11.60	Ras Al Khaimah Cement	2.67	-9.8%	240.1%	17.82
Sharjah Cement	0.72	10.8%	-5.3%	0.00	Al Qudra Holding	1.89	-5.5%	71.8%	4.14
PALMS SPORTS	11.70	7.5%	-11.4%	10.34	Methaq Takaful Ins.	0.97	-2.5%	11.8%	0.87
Waha Capital	1.82	4.6%	51.7%	9.30	Arkan Building Materials	1.21	-2.4%	37.5%	7.72
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£)
Heliopolis Housing	5.15	3.0%	-15.6%	53.31	Sidi Kerir Petrochemicals	11.25	-4.5%	20.8%	25.88
Fawry For Banking Technology And Electronic Payment	18.05	1.6%	-30.9%	22.22	Raya Holding For Financial Investments	2.79	-3.1%	282.2%	2.55
Speed Medical	2.16	1.4%	32.5%	22.79	Ezz Steel	14.70	-2.3%	37.0%	34.43
Orascom Development Egypt	5.10	1.4%	4.1%	6.65	Palm Hills Development Company	1.75	-1.7%	28.3%	5.95
GB AUTO	3.95	1.0%	19.0%	3.60	ELSWEDY ELECTRIC	8.74	-1.1%	-10.9%	12.63
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	15.04	15.04	0.0%	14.13	GB AUTO	3.95	3.95	0.0%	3.60
Sidi Kerir Petrochemicals	11.25	11.25	0.0%	25.88	Medinet Nasr Housing	3.23	3.23	0.0%	43.81
Pioneers Holding	4.90	4.90	0.0%	8.90	Palm Hills Dev. Company	1.75	1.75	0.0%	5.95
Oriental Weavers	8.33	8.33	0.0%	1.00	T M G Holding	7.19	7.19	0.0%	2.42
MM Group For Industry And International Trade	7.68	7.68	0.0%	5.80	Cleopatra Hospital Company	4.48	4.16	7.7%	2.84

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	1428.50	4.0%	121.9%	20467.963	Shree Cement limited	26550.00	-2.1%	10.6%	2423.06
Jsw Steel	747.30	3.5%	93.0%	8844.70	Kotak Mahindra Bank	1778.60	-1.9%	-10.9%	5523.09
Indian Oil	104.80	2.5%	15.2%	1123.81	Sun Pharm. Industries	779.25	-1.8%	31.6%	3338.44
NTPC	117.10	2.4%	17.9%	934.92	Bajaj Auto	3736.00	-1.6%	8.5%	1854.82
Hindalco Industries	436.50	2.2%	81.5%	8413.65	Icici Bank	693.80	-1.0%	29.7%	6761.76
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	1675.10	1684.00	-0.5%	8211.79	Hero Motocorp	2782.65	2674.15	4.1%	1531.35
Tech Mahindra	1320.95	1329.70	-0.7%	4513.45	Britannia Inds.	3626.30	3317.30	9.3%	843.20
Hcl Technologies	1067.00	1079.00	-1.1%	5356.01	Maruti Suzuki India	7023.80	6270.15	12.0%	2897.43
Tata Consultancy Svs.	3348.00	3399.65	-1.5%	6454.16	Dr Reddys Lab	4749.60	4135.00	14.9%	2492.70
Bharti Airtel	619.00	629.25	-1.6%	11412.06	Reliance Industries	2115.00	1830.00	15.6%	8916.78

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Absa Bank Kenya	9.92	1.2%	2.7%	1.78	Stanbic Holdings	86.00	-4.2%	1.2%	0.54
Centum Investment Company Plc	15.60	0.6%	-2.8%	1.93	Nairobi Securities Exchange Plc	8.50	-3.2%	4.2%	0.09
Nation Media Group	24.95	0.4%	61.5%	0.16	Bamburi Cement Limited	37.95	-2.2%	0.3%	0.25
KCB Group Plc	46.60	0.3%	22.3%	47.86	Kenya Reinsurance Corporation Ltd	2.55	-1.9%	9.9%	0.37
British American Tobacco Kenya Ltd	450.50	0.1%	24.8%	24.42	WPP Scangroup Plc	4.40	-0.7%	-26.7%	0.90
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	46.60	47.00	-0.9%	47.86	WPP Scangroup Plc	4.40	4.32	1.9%	0.90
Equity Group Holdings Plc	50.25	50.75	-1.0%	45.42	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	11.67
Safaricom Plc	42.95	43.45	-1.2%	307.73	Kengen Limited	4.12	3.90	5.6%	0.55
The Cooperative Bank of Kenya Ltd	13.75	14.05	-2.1%	1.75	Centum Investment Company Plc	15.60	14.05	11.0%	1.93
Nation Media Group	24.95	26.50	-5.8%	0.16	Diamond Trust Bank Limited	65.00	57.50	13.0%	6.19

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
United International Transportation Co.	49.40	4.1%	30.0%	111.18	Al-Rajhi Company for Coop Insurance	102.60	-4.3%	26.8%	103.02
Tanmiah Food Co.	111.80	4.1%	66.9%	608.64	Makkah Construction and Development Co.	63.40	-4.2%	-0.9%	124.77
Saudi Arabian Mining Co.	74.40	3.5%	83.7%	95.05	Alahli Takaful Co.	37.10	-4.1%	6.3%	32.75
SEDCO Capital REIT Fund	13.44	3.2%	43.7%	31.45	National Company for Learning and Education	66.00	-4.1%	26.4%	49.20
Maharah Human Resources Co.	80.50	3.1%	6.6%	299.57	Bupa Arabia for Coop Insurance Co.	155.80	-3.8%	27.5%	55.80
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	70.50	70.50	0.0%	68.10	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.00	60.00	0.0%	499.13	BinDawood Holding Co.	107.40	105.60	1.7%	6.49
Zamil Industrial Investment Co.	38.95	38.95	0.0%	24.91	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	49.40	49.40	0.0%	111.18	Savola Group	40.95	36.60	11.9%	28.68
United Electronics Co.	133.20	133.20	0.0%	14.71	Saudi Airlines Catering Co.	80.30	70.50	13.9%	52.06

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields	13295.00	6.1%	-3.4%	37058.15	Naspers Ltd	284650.00	-3.8%	-5.7%	217871.11
Anglogold Ashanti	23967.00	5.5%	-30.0%	97207.08	Anglo American Platinum	167000.00	-2.2%	22.8%	34809.15
Sibanye Stillwater	6134.00	3.9%	2.2%	53599.97	Redefine Properties	434.00	-1.1%	30.3%	4310.50
Impala Platinum	24845.00	3.2%	23.1%	34411.27	Nedbank Group	18144.00	-1.1%	40.1%	28193.31
Multichoice Group	12464.00	2.9%	-7.0%	8323.95	Prosus	135032.00	-1.0%	-15.9%	154662.41
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	69485.00	69886.00	-0.6%	77527.68	Anglogold Ashanti	23967.00	22600.00	6.0%	97207.08
Mondi (JSE)	41977.00	42245.00	-0.6%	9038.57	Brit.Amer.Tobacco	54700.00	50757.00	7.8%	49994.87
MTN Group	11525.00	11599.00	-0.6%	38616.61	Gold Fields	13295.00	12193.00	9.0%	37058.15
Clicks Group	27757.00	28113.00	-1.3%	14501.92	Vodacom Group	13352.00	12020.00	11.1%	11739.64
Firstrand Ltd	5725.00	5820.00	-1.6%	38725.97	Naspers Ltd	284650.00	247868.00	14.8%	217871.11

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Tien Phong Commercial Joint Stock Bank	37000.00	2.8%	17.5%	497026.80	Khang Dien House Trading & Investment	40050.00	-4.4%	50.4%	397100.39
PetroVietnam Power Corp	11450.00	1.8%	-15.8%	161846.50	Saigon Securities	57700.00	-2.9%	175.4%	1,039205.61
Vinamilk	90900.00	1.7%	-16.0%	484605.88	Vietnam Rubber Group JSC	34100.00	-2.6%	13.9%	212687.19
Vietcombank	100500.00	1.5%	403.8%	172824.98	Vingroup JSC	111000.00	-1.8%	13.4%	267934.86
BaoViet Holdings	54200.00	1.5%	-17.9%	73093.72	FPT Corp	96100.00	-1.7%	88.7%	472971.55
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	61200.00	61200.00	0.0%	824505.40	Military Commercial Bank	29700.00	29700.00	0.0%	584539.62
Vietjet Aviation	118700.00	118700.00	0.0%	61041.63	Vietnam National Petroleum Group	53400.00	53400.00	0.0%	150582.21
Vingroup JSC	111000.00	111000.00	0.0%	267934.86	PetroVietnam Power Corp	11450.00	11450.00	0.0%	161846.50
Vinhomes	116000.00	116000.00	0.0%	962447.18	Sai Gon Thuong Tin Commercial	30400.00	30400.00	0.0%	800249.94
Techcombank	52300.00	52300.00	0.0%	1078719.51	Tien Phong Commercial Joint Stock Bank	37000.00	37000.00	0.0%	497026.80

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