

# Daily Market Report

## 13 August 2021

### JSE

JSE All-Share Index declined by 0.31% to close at 69,401.94 points on Thursday, as the Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 170.24 points, up by 0.26% on Thursday with Solibra Côte d'Ivoire and Crown Siem Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share increased by 0.11% to close at 39,490.06 points on Thursday, as the Industrial sector recorded gains.

### EGX

EGX 30 Index was closed on Thursday on account of Islamic New Year.

### ESG

Casablanca ESG 10 Index closed at 936.87 points on Thursday, as it declined by 0.36%.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.31%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.26%
<b>NSE</b> Nigerian Stock Exchange	▲ 0.11%
<b>EGX</b> Egyptian Stock Exchange	↔ 0.00%
<b>ESG</b> Casablanca Stock Exchange	▼ 0.36%

### African Markets

**Nigeria:** NSE 30 Index increased marginally by 0.07% and closed at 1,636.13 points on Thursday. Flour Mills and Guaranty were the top gainers.

**Egypt:** EGX 30 Index was closed on Thursday on account of Islamic New Year.

**Kenya:** NSE 20 Index decreased by 0.51% and closed at 1,952.28 points on Thursday. Nairobi Securities Exchange and Kenya Power & Lighting were the top losers.

**South Africa:** JSE Top 40 Index decreased by 0.33% to close at 63,276.98 points on Thursday, as the Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.12
<b>INTERBANK RATES</b>	
OBB	16.67 ▼
Overnight	17.33 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX General was closed on Thursday on account of Islamic New Year.

**Vietnam:** VN-30 Index fell 0.73% to close at 1,477.06 points on Thursday, as the blue chip companies recorded losses. MSCI Vietnam declined by 0.46% to close at 1,034.06 points.

**Saudi Arabia:** Tadawul All Share Index inched down 0.01% to close at 11,323.70 points on Thursday, as losses in the Insurance, Agriculture & Food and Transport sectors led shares lower. MSCI Tadawul 30 Index was up by 0.14% to close at 1,531.79 points.

**India:** Nifty 50 increased by 0.50% to close at 16,364.40 points on Thursday, as gains in the IT, Media, Real Estate, Auto and Banking sectors pushed the shares higher. MSCI India increased by 0.51% to close at 1,894.15 points.

### News

#### Nigeria:

FG, states, LGs suffer N329.6bn shortfall in five months  
Shell agrees N45.9bn Ogoni oil spill payment 10 years after judgment  
SEC to partner RIMAN on capital market expansion

#### Kenya:

Stanbic Holdings Half-Year Net Earnings up 35% to KSh 3.5 Billion  
Dollar deposits surge by Sh15 billion in June  
High liquidity helps CBK tap Sh80.3bn in bond sale

#### Abu Dhabi:

UAE consumer confidence rising with steady economic recovery  
Blackrock invests in Mubadala Capital's PE assets  
UAE's Shuaa Capital posts biggest H1 net profit in a decade

#### Saudi Arabia:

OPEC+ can resist White House call for more oil with US gas prices set to drop  
Saudi Arabia plans to attract \$7.3bn into health from private investors  
SISCO H1 revenue up 30% at \$132mln

#### Egypt:

Ongoing cooperation portfolio bet. Egypt, China hits \$1.8B  
Egypt targets 5.4% growth rate in FY 2021/22  
Egypt, China organize 35 training programs to develop govt cadres

#### South Africa:

MTN reports growth in subscribers and revenue  
Nedbank resumes dividend payments as the country's economy rebounds  
IDC launches R1.5bn post-unrest funding package

#### India:

Retail inflation at 3-month low in July, June factory output up 13.6%  
Tata Steel returns to black; Q1 profit at Rs 9,768 crore  
Govt to sell up to 25% stake in NSC via IPO; invites bids from merchant bankers

#### Vietnam:

Gov't to roll out US\$5.2 billion COVID-19 relief package  
Banks continue to cut interest rates for pandemic-hit clients  
Industrial property sees rising FDI despite new pandemic outbreak

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,594.35	0.0%	2.4%	2.7%	50.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,884.50	0.0%	1.5%	0.7%	0.4%	EGP/USD	15.70	0.1%	-0.2%
India	16,364.40	0.5%	0.8%	3.8%	17.0%	INR/USD	74.26	-0.3%	1.6%
Kenya	1,952.28	-0.5%	-1.1%	-1.1%	4.5%	KES/USD	109.20	0.0%	0.0%
Nigeria	1,636.13	0.1%	-0.1%	-0.2%	-0.2%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	11,323.70	-0.01%	1.0%	2.3%	30.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	63,276.98	-0.3%	1.2%	0.7%	16.4%	ZAR/USD	14.79	0.6%	0.7%
Vietnam	1,477.06	-0.7%	0.0%	2.1%	37.9%	VND/USD	22,810.00	0.0%	-1.2%

## MSCI Emerging Markets

MSCI Frontier	653.87	0.0%	0.7%	1.8%	14.4%	Brent Crude (\$)	71.31	-0.2%	37.7%
MSCI Frontier 100	1,469.05	0.1%	1.0%	2.1%	16.8%	Gold (\$)	1,751.80	-0.1%	-7.6%
MSCI Emerging	1,290.91	-0.5%	-0.1%	1.0%	0.0%	Copper (\$)	9,467.50	-0.5%	21.9%
MSCI World (USD)	3,115.74	0.2%	0.6%	1.5%	15.8%	Coffee (\$)	161.68	1.4%	35.6%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.79	3.9%	14.5%	1.73	Sterling	1.54	-3.1%	-24.5%	18.50
Flour Mills	29.90	3.1%	15.0%	29.72	Transnational Corporation	0.93	-3.1%	3.3%	7.57
Unilever	14.40	0.7%	3.6%	4.28	Dangote Sugar	17.50	-2.8%	-0.6%	39.24
Dangote Cement	241.60	0.7%	-1.3%	118.30	Ecobank	5.70	-1.7%	-5.0%	26.90
Zenith	24.30	0.4%	-2.0%	269.78	FCMB	3.10	-1.3%	-6.9%	42.71
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%	2.21	UBN	5.25	4.65	12.9%	0.41
Seplat Petroleum	770.00	770.00	0.0%	0.14	Transcorp Hotels	3.92	3.25	20.6%	0.17
P Z Cussons	6.00	6.00	0.0%	1.06	Cap	20.20	15.25	32.5%	0.81
Okomu Oil	110.00	110.00	0.0%	8.71	Sterling	1.54	1.13	36.3%	18.50
Nestle	1540.00	1540.00	0.0%	8.12	Unilever	14.40	10.50	37.1%	4.28

### 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

\*Market closed on 12/8

## 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

\*Market closed on 12/8

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Power Grid Corp Of India	187.00	6.0%	-1.5%	8004.924	Eicher Motors	2610.80	-4.0%	3.2%	5947.07
Tech Mahindra	1383.00	4.5%	42.1%	11792.06	Dr Reddys Lab	4708.00	-0.8%	-9.6%	2934.52
Tata Motors	306.80	3.8%	66.9%	10177.64	Cipla	905.00	-0.5%	10.4%	1937.20
Larsen & Toubro	1624.00	2.6%	26.1%	2654.55	ONGC	116.40	-0.5%	25.1%	1574.44
Hcl Technologies	1093.00	2.4%	15.5%	7110.12	Indian Oil	104.15	-0.5%	14.5%	937.85
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	1684.95	1696.50	-0.7%	9551.39	Hero Motocorp	2782.55	2704.00	2.9%	1143.85
Hcl Technologies	1093.00	1101.15	-0.7%	7110.12	Britannia Inds.	3626.00	3317.30	9.3%	844.67
Tech Mahindra	1383.00	1394.80	-0.8%	11792.06	Maruti Suzuki India	7009.50	6270.15	11.8%	2319.90
Power Grid Corp Of India	187.00	188.63	-0.9%	8004.92	Dr Reddys Lab	4708.00	4135.00	13.9%	2934.52
Bharti Airtel	621.15	629.25	-1.3%	5146.28	Reliance Industries	2109.80	1830.00	15.3%	7943.31

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
KCB Group Plc	46.90	0.6%	23.1%	47.68	Nairobi Securities Exchange Plc	8.24	-3.1%	1.0%	0.18
British American Tobacco Kenya Ltd	452.00	0.3%	25.2%	0.32	Kenya Power & Lighting Limited	1.35	-2.9%	-21.1%	32.96
KenGen Limited	4.13	0.2%	-12.3%	0.48	Kenya Reinsurance Corporation Ltd	2.50	-2.0%	7.8%	6.88
Bamburi Cement Limited	38.00	0.1%	0.4%	0.02	Absa Bank Kenya	9.76	-1.6%	1.0%	1.15
Safaricom Plc	43.00	0.1%	25.5%	56.40	NCBA Group Plc	25.10	-1.4%	-6.2%	1.54
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	46.90	47.20	-0.6%	47.68	WPP Scangroup Plc	4.40	4.32	1.9%	0.56
Equity Group Holdings Plc	50.25	50.75	-1.0%	58.08	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	5.28
Safaricom Plc	43.00	43.45	-1.0%	56.40	KenGen Limited	4.13	3.90	5.9%	0.48
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	0.84	Centum Investment Company Plc	15.55	14.05	10.7%	0.70
Nation Media Group	24.90	26.50	-6.0%	0.28	Diamond Trust Bank Limited	65.00	57.50	13.0%	0.01

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Arab Sea Information System Co.	148.80	4.9%	74.0%	133.40	Southern Province Cement Co.	78.80	-4.6%	-6.5%	28.67
Ataa Educational Co.	65.70	3.3%	66.3%	70.51	Saudi Industrial Services Co.	46.10	-4.3%	42.3%	117.28
Saudi Electricity Co.	26.95	3.1%	26.5%	178.57	Al-Rajhi Company for Cooperative Insurance	98.50	-4.0%	21.8%	55.02
Middle East Healthcare Co.	40.85	2.8%	16.5%	145.75	Electrical Industries	33.25	-3.8%	29.4%	50.46
Naseej International Trading Co	102.60	2.6%	3.6%	48.43	AXA Cooperative Insurance Co.	41.20	-3.4%	15.4%	23.50
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%	75.88	BinDawood Holding Co. National	106.80	105.60	1.1%	9.49
The Saudi National Bank	60.00	60.00	0.0%	206.78	Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	38.25	38.25	0.0%	40.63	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%	91.52	Savola Group	40.50	36.60	10.7%	27.38
United Electronics Co.	133.20	133.20	0.0%	29.80	Saudi Airlines Catering Co.	82.30	70.50	16.7%	302.13

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	12000.00	4.1%	99.4%	129239.59	Anglogold Ashanti	22890.00	-4.5%	-33.2%	49021.84
Mr Price Group	22614.00	1.5%	32.5%	20957.89	Nedbank Group	17351.00	-4.4%	34.0%	77827.34
Clicks Group	28027.00	1.0%	10.9%	20765.23	Gold Fields	12746.00	-4.1%	-7.3%	22256.90
Spar Group	19364.00	0.9%	2.2%	11878.48	Impala Platinum	24177.00	-2.7%	19.7%	40103.74
ABSA Group	14753.00	0.7%	23.1%	37584.96	Redefine Properties	425.00	-2.1%	27.6%	1628.78
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)	41960.00	42245.00	-0.7%	7451.89	Anglogold Ashanti	22890.00	22600.00	1.3%	49021.84
Anglo American	69255.00	69900.00	-0.9%	79363.67	Gold Fields	12746.00	12193.00	4.5%	22256.90
Clicks Group	28027.00	28334.00	-1.1%	20765.23	Brit.Amer.Tobacco	54743.00	50757.00	7.9%	39591.78
Investec Plc	5750.00	5860.00	-1.9%	11037.53	Vodacom Group	13416.00	12020.00	11.6%	10346.75
MTN Group	12000.00	12238.00	-1.9%	129239.59	Naspers Ltd	283614.00	247868.00	14.4%	254571.64

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
BaoViet Holdings	55300.00	2.0%	-16.2%	78708.04	Mobile World Inv. Corp	170000.00	-2.9%	43.0%	201855.29
Vietnam Prosperity	61900.00	1.1%	-50.5%	614.208.49	Sai Gon Thuong Tin Commercial	29600.00	-2.6%	-8.9%	840.594.04
Khang Dien House Trading & Investment	40400.00	0.9%	51.7%	176.518.75	FPT Corp	93800.00	-2.4%	84.2%	795.485.97
Vinhomes	117000.00	0.9%	336.6%	608.078.15	Asia Commercial JS Bank	35300.00	-1.9%	57.0%	433.153.35
Vietnam Rubber Group JSC	34300.00	0.6%	14.5%	195062.35	Masan Group Corp	134000.00	-1.9%	52.0%	263621.72
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	61900.00	61900.00	0.0%	614.208.49	Hoa Phat Group JSC	48400.00	48400.00	0.0%	1,049,295.20
Vietjet Aviation	118700.00	118700.00	0.0%	56799.04	Military Commercial Bank	29500.00	29500.00	0.0%	289747.47
Vingroup JSC	111100.00	111100.00	0.0%	204.117.36	Vietnam National Petroleum Group	53000.00	53000.00	0.0%	115031.76
Vinhomes	117000.00	117000.00	0.0%	608.078.15	PetroVietnam Power Corp	11350.00	11350.00	0.0%	90.273.47
Techcombank	52000.00	52000.00	0.0%	617266.77	Sai Gon Thuong Tin Commercial	29600.00	29600.00	0.0%	840.594.04

Email: [research@fsdhgroup.com](mailto:research@fsdhgroup.com) • [www.fsdhgroup.com](http://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.