

# Daily Market Report

**FSU** RESEARCH

# 16 August 2021

#### JSE

JSE All-Share Index inched down 0.02% to close at 69,384.75 points on Friday, as the Industrial sector recorded losses.

#### BRVM

BRVM Composite Index closed at 170.51 points, up by 0.16% on Friday with Safca Côte d'Ivoire and Sicor Côte d'Ivoire being the top gainers.

#### NSE

NSE All-Share marginally increased by 0.08% to close at 39,522.34 points on Friday, as the Consumer Goods, Insurance, Banking and Industrial sectors recorded gains.

#### EGX

EGX 30 Index jumped by 1.33% and closed at 11,029.56 points on Sunday, as the market gained LE 4.04 billion of market cap, amid Arab and foreign buying.

#### ESG

Casablanca ESG 10 Index closed at 945.65 points on Friday, as it rose 0.94%.

### **African Markets**

**Nigeria:** NSE 30 Index increased by 0.12% and closed at 1,638.09 points on Friday. Unilever and Lafarge Africa were the top gainers.

**Egypt:** EGX 30 Index jumped by 1.33% and closed at 11,029.56 points on Sunday, as the market gained LE 4.04 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index increased by 0.45% and closed at 1,961.07 points on Friday. Nairobi Securities Exchange and Total Kenya were the top gainers.

**South Africa:** JSE Top 40 Index inched down 0.01% to close at 63,269.04 points on Friday, as the Industrial sector recorded losses.

Capital Markets		
<b>JSE</b> Johannesburg Stock Exchange	•	0.02%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières		0.16%
<b>NSE</b> Nigerian Stock Exchange		0.08%
<b>EGX</b> Egyptian Stock Exchange		1.33%
<b>ESG</b> Casablanca Stock Exchange		0.94%

# **Nigeria Key Indicators**

	Current
Inflation	17.75%
Exchange Rate	₦ 410.11

#### INTERBANK RATES

OBB	16.75 🔺
Overnight	17.25 🔻

### **Other Emerging Markets**

**Abu Dhabi:** ADX General Increased by 0.10% to close at 7,601.64 points on Sunday, as International Holding Company and First Abu Dhabi Bank recorded gains. MSCI UAE Index remained unchanged at 398.39 points.

Vietnam: VN-30 Index increased by 0.49% to close at 1,484.25 points on Friday, as the blue chip companies recorded gains. MSCI Vietnam was up by 0.13% to close at 1,035.45 points.

Saudi Arabia: Tadawul All Share Index increased by 0.25% to close at 11,351.63 points on Sunday, as gains in the Energy & Utilities, Hotels & Tourism and Insurance sectors pushed the shares higher. MSCI Tadawul 30 Index was up by 0.14% to close at 1,533.95 points.

India: Nifty 50 rose 1.01% to close at 16,529.10 points on Friday, as gains in the Technology, Capital Goods and IT sectors pushed the shares higher. MSCI India increased by 0.75% to close at 1,908.39 points.

# News

#### Nigeria:

Foreign reserves resume decline after rising to \$33.59bn

FG Earmarks N59b for Rural Roads Development: Budget Minister Total pension assets will hit N20tn by 2023

- Report

#### Kenya:

Page 1 of 4

CBK Accepts KSh 7 bn at Auction, a 29.3% Undersubscription Kenya Shilling Weakens further Against US\$ Equity's tech unit takes on Safaricom in Internet race

#### Abu Dhabi:

Amanat reports record high profitability of Dh235.3 million in H1 Julphar returns to profitability, posts Dh73 million net profit for Q2 ADNOC's shipping arm signs deal with Roll Group for transport solutions

#### Saudi Arabia:

Saudi Aramco joins PIF's \$906mln renewable energy project Saudi Arabia's July inflation rate up 0.4% Saudi Arabia's wholesale prices increase 12% in July– GaStat

#### Egypt:

EGX targets new resistance level of 11.200 points this week

Egypt receives \$282mln Ioan tranche as part of AMF Structural Adjustment Facility ADIB Egypt approves Tycoon's offer to acquire Alexandria National Investment

#### South Africa:

Construction ind. welcomes publication of long term SA infrastructure plan SA's financial wealth grows 4.5% to R10.3trl with more on the way Govt approves UIF relief scheme for employees impacted by civil unrest

#### India:

PM announces Rs 100 lakh cr Gatishakti scheme for holistic infra growth Forex reserves rise by \$889 million to lifetime high of \$621.46 bn Exports up 49.85% in July to \$35.43 billion; trade deficit at \$10.97 billion

## Vietnam:

Binh Duong province earns 4.5 bn USD trade surplus despite COVID-19 Forestry production expected to rise 5.5% annually in 2021-2025 period VPBank's charter capital to reach 3.3 billion USD by 2022



Indices and FX Dat	a								
Indices	Last Trade	1 <b>d%</b>	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1 <b>d%</b>	YTD%
Abu Dhabi	7,601.64	0.1%	0.1%	2.8%	50.7%	AED/USD	3.67	0.0%	0.0%
Egypt	11,029.56	1.3%	1.3%	2.0%	1.7%	EGP/USD	15.70	0.0%	-0.2%
India	16,529.10	1.0%	0.0%	4.9%	18.2%	INR/USD	74.25	0.0%	1.6%
Kenya	1,961.07	0.5%	0.0%	-0.7%	5.0%	KES/USD	109.30	0.1%	0.1%
Nigeria	1,638.09	0.1%	0.0%	-0.1%	-0.1%	NGN/USD	411.50	-0.1%	4.2%
Saudi Arabia	11,351.63	0.2%	0.2%	2.6%	30.6%	SAR/USD	3.75	0.0%	0.0%
South Africa	63,269.04	-0.01%	0.0%	0.7%	16.3%	ZAR/USD	14.72	-0.5%	0.2%
Vietnam	1,484.25	0.5%	0.0%	2.6%	38.6%	VND/USD	22,832.50	0.1%	-1.1%
MCCI Emonstra Mo	ulcoto								
MSCI Emerging Ma	irkets								
MSCI Frontier	656.28	0.4%	0.0%	2.2%	14.8%	Brent Crude (\$)	70.59	-1.0%	36.3%
MSCI Frontier 100	1,473.41	0.3%	0.0%	2.4%	17.1%	Gold (\$)	1,778.20	1.5%	-6.2%

9,570.00

163.22

1.1%

1.0%

23.2%

36.9%

# **STOCKS**

MSCI Emerging

MSCI World (USD)

1,280.86

3,125.12

-0.8%

0.3%

0.0%

0.0%

0.2%

1.8%

-0.8%

16.2%

Copper (\$)

Coffee (\$)

Nigeria									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1 <b>d%</b>	YTD%	Val (mn ₦)
Unilever	15.55	8.0%	11.9%	15.33	FCMB	3.02	-2.6%	-9.3%	3.47
Axamansard	0.91	3.4%	-13.3%	0.58	UBN	5.20	-1.0%	-2.8%	4.98
Lafarge Africa	22.30	2.3%	5.9%	17.06	P Z Cussons	5.95	-0.8%	12.3%	1.99
Transnational Corporation	0.95	2.2%	5.6%	3.52	Sterling	1.53	-0.6%	-25.0%	21.17
Fidelity	2.50	2.0%	-0.8%	20.68	Guinness	31.50	-0.6%	65.8%	12.33
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%	328.26	UBN	5.20	4.65	11.8%	4.98
Seplat Petroleum	759.70	759.70	0.0%	2.53	Transcorp Hotels	3.92	3.25	20.6%	0.04
P Z Cussons	5.95	5.95	0.0%	1.99	Сар	20.20	15.25	32.5%	1.05
Okomu Oil	110.00	110.00	0.0%	13.01	Sterling	1.53	1.13	35.4%	21.17
Nestle	1540.00	1540.00	0.0%	203.47	Custodian	6.25	4.55	37.4%	0.06

Abu Dhabi									
Top 5 Gainers	Last Price	1 <b>d%</b>	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1 <b>d%</b>	YTD%	Val (mn DH)
Ras Al Khaimah Poultry	1.85	8.8%	27.6%	0.01	Gulf Medical Projects	1.94	-9.8%	-19.2%	0.00
Ras Al Khaimah Cement	2.87	7.5%	265.6%	27.57	Fujairah Cement Industries	0.51	-9.7%	-61.4%	0.23
Al Qudra Holding	2.00	5.8%	81.8%	4.45	Sudatel Telecom	0.37	-6.4%	-12.0%	0.05
Abu Dhabi Ship Building	3.79	3.6%	62.7%	1.77	National Corp for Tourism and Hotels	2.90	-3.3%	60.2%	1.41
Abu Dhabi Aviation	4.31	2.1%	19.1%	4.20	Waha Capital	1.76	-3.3%	46.7%	2.71
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	35.00	35.00	0.0%	5.06	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	1 <b>d%</b>	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1 <b>d%</b>	YTD%	Val (mn E£)
Speed Medical	2.26	4.6%	38.7%	51.18	Raya Holding For Financial Investments	2.72	-2.5%	272.6%	1.89
Commercial International Bank	61.92	3.0%	4.6%	117.93	T M G Holding	7.02	-2.4%	6.8%	7.32
Egyptian Financial Group- HermesHolding Company	11.51	2.1%	-21.3%	16.10	Medinet Nasr Housing	3.16	-2.2%	-17.3%	49.81
Cairo For Investment And Real Estate Development	11.83	2.1%	-17.0%	3.87	Heliopolis Housing	5.07	-1.6%	-16.9%	17.71
Credit Agricole Egypt	25.33	2.0%	-12.7%	27.02	Tenth Of Ramadan Pharma. Industries & Diagnostic	2.90	-1.4%	-23.7%	3.99
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	14.87	14.87	0.0%	1.27	GB AUTO	4.02	4.02	0.0%	26.86
Sidi Kerir Petrochemicals	11.15	11.15	0.0%	9.45	Medinet Nasr Housing	3.16	3.16	0.0%	49.81
Pioneers Holding	4.99	4.99	0.0%	14.77	Palm Hills Dev. Company	1.75	1.75	0.0%	5.17
Oriental Weavers	8.22	8.22	0.0%	4.00	T M G Holding	7.02	7.02	0.0%	7.32
MM Group For Industry AndInternational Trade	7.82	7.82	0.0%	6.88	Cleopatra Hospital Company	4.46	4.16	7.2%	1.20

India									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	<b>Top 5 Losers</b>	Last Price	1 <b>d%</b>	YTD%	Val (mn ₹)
Tata Consumer products ltd.	805.25	4.0%	36.5%	6365.591	Eicher Motors	2545.00	-2.7%	0.6%	10577.90
Tata Consultancy Svs.	3456.05	3.1%	20.7%	15006.06	Dr Reddys Lab	4642.55	-1.6%	-10.8%	3717.56
Larsen & Toubro	1665.05	2.6%	29.3%	9021.91	Power Grid Corp Of India	184.65	-1.3%	-2.7%	3725.53
Hcl Technologies	1123.95	2.5%	18.8%	8096.26	Cipla	894.40	-1.2%	9.1%	2628.78
Tata Steel	1467.25	2.2%	128.0%	41576.98	Britannia Inds.	3581.00	-1.1%	0.1%	1165.12
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn₹)
Stocks near 52 w high Hcl Technologies	Last Price 1123.95	<b>52w H</b> 1123.95	% Change	<b>Value (mn ₹)</b> 8096.26		<b>Last Price</b> 2774.00	<b>52w L</b> 2705.30	% Change 2.5%	<b>Val (mn ₹)</b> 3016.80
		-		. ,	Low		-		
Hcl Technologies	1123.95	1123.95	0.0%	8096.26	<b>Low</b> Hero Motocorp	2774.00	2705.30	2.5%	3016.80
Hcl Technologies Bharti Airtel	1123.95 636.20	1123.95 638.80	0.0%	8096.26 13103.96	Low Hero Motocorp Britannia Inds.	2774.00 3581.00	2705.30 3317.30	2.5% 7.9%	3016.80 1165.12

Ke	nya

Кепуа									
Top 5 Gainers	Last Price	1 <b>d%</b>	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1 <b>d%</b>	YTD% V	al (mn KSh)
Nairobi Securities Exchange Plc	8.46	2.7%	3.7%	0.28	Kengen Limited	4.05	-1.9%	-14.0%	0.91
Total Kenya Ltd	24.50	2.5%	2.1%	0.04	WPP Scangroup Plc	4.36	-0.9%	-27.3%	0.05
Equity Group Holdings Plc	51.00	1.5%	39.5%	43.17	Diamond Trust Bank Limited	64.50	-0.8%	-14.0%	0.40
NCBA Group Plc	25.40	1.2%	-5.0%	1.86	Centum Investment Company Plc	15.45	-0.6%	-3.7%	0.95
Kenya Power & Lighting Limited	1.36	0.7%	-20.5%	0.42	Standard Chartered Bank Kenya Ltd	130.75	-0.2%	-9.4%	24.12
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change Va	al (mn KSh)
Equity Group Holdings Plc	51.00	51.50	-1.0%	43.17	WPP Scangroup Plc	4.36	4.31	1.2%	0.05
Safaricom Plc	43.00	43.45	-1.0%	21.90	Standard Chartered Bank Kenya Ltd	130.75	127.00	3.0%	24.12
KCB Group Plc	47.15	48.00	-1.8%	43.16	Kengen Limited	4.05	3.90	3.8%	0.91
The Cooperative Bank of Kenya Ltd	13.80	14.05	-1.8%	73.98	Centum Investment Company Plc	15.45	14.05	10.0%	0.95
Nation Media Group	25.00	26.50	-5.7%	0.44	Diamond Trust Bank Limited	64.50	57.50	12.2%	0.40

Saudi Arabia									
Top 5 Gainers	Last Price	1 <b>d%</b>	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD% V	al (mn SAR)
Ataa Educational Co.	72.20	9.9%	82.8%	95.87	Saudi Chemical Co.	41.35	-3.4%	18.3%	49.74
Saudi Arabia Refineries Co.	173.00	7.5%	64.4%	318.60	Saudi Ground Services Co.	34.35	-3.1%	7.0%	80.57
Al-Rajhi Company for Cooperative Insurance	104.00	5.6%	28.6%	79.47	Al Hammadi Co for Development and Investment	40.50	-2.9%	40.1%	25.00
Arab Sea Information System Co.	157.00	5.5%	83.6%	147.08	Mouwasat Medical Services Co.	202.80	-2.5%	47.0%	13.27
National Company for Learning and Education	70.20	5.4%	34.5%	98.59	Theeb Rent a Car Co	68.80	-2.4%	32.3%	91.24
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change V	al (mn SAR)
Theeb Rent a Car Co	68.80	68.80	0.0%	91.24	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	38.80	38.80	0.0%	26.62	BinDawood Holding Co.	107.20	105.60	1.5%	15.30
United International Transportation Co.	48.60	48.60	0.0%	24.63	Abdullah A. M. Al- Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	133.00	133.00	0.0%	9.76	Savola Group	40.50	36.60	10.7%	27.77
United Cooperative Assurance Co.	28.90	28.90	0.0%	5.77	Saudi Airlines Catering Co.	81.30	70.50	15.3%	57.54

# South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields	13180.00	3.4%	-4.2%	36321.54	Prosus	130900.00	-2.5%	-18.5%	522554.50
Mr Price Group	23171.00	2.5%	35.8%	27369.01	Multichoice Group	12020.00	-1.7%	-10.3%	9189.39
Anglogold Ashanti	23443.00	2.4%	-31.6%	42884.21	Bidvest Group	19482.00	-1.5%	24.1%	20766.92
Sibanye Stillwater	6175.00	1.5%	2.9%	47243.23	Naspers Ltd	280718.00	-1.0%	-7.0%	844292.23
Clicks Group	28344.00	1.1%	12.2%	19207.60	Reinet Investments (JSE) SCA	28743.00	-0.8%	4.3%	7077.91
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)
Clicks Group	28344.00	28497.00	-0.5%	19207.60	Anglogold Ashanti	23443.00	22600.00	3.7%	42884.21
Mondi	42026.00	42260.00	-0.6%	12305.76	Brit.Amer.Tobacco	54850.00	50757.00	8.1%	34664.05
Firstrand Ltd	5755.00	5820.00	-1.1%	45652.97	Gold Fields	13180.00	12193.00	8.1%	36321.54
Investec Plc	5780.00	5860.00	-1.4%	12053.53	Vodacom Group	13389.00	12020.00	11.4%	19826.15
Anglo American	68894.00	69924.00	-1.5%	103186.54	Naspers Ltd	280718.00	247868.00	13.3%	844292.23

Vietnam									
Top 5 Gainers	Last Price	1d%	YTD%	Value (mn <u>đ</u> )	Top 5 Losers	Last Price	1 <b>d%</b>	YTD%	Val (mn <u>đ</u> )
Khang Dien House Trading & Investment	41800.00	3.5%	56.9%	172.107.45	BaoViet Holdings	54400.00	-1.6%	-17.6%	45.226.95
Vietnam Prosperity	63600.00	2.8%	-49.1%	956.026.32	Petrovietnam Gas	93000.00	-1.6%	10.8%	121.817.46
Vinhomes	120000.00	2.6%	347.8%	1210690.71	Phat Dat Real Estate Devpt Corp	91600.00	-1.0%	118.5%	317939.89
Saigon Securities Inc	59000.00	2.3%	181.6%	1260795.78	Ho Chi Minh City Devp	34750.00	-0.9%	46.3%	92659.58
Vietnam Rubber Group JSC	34800.00	1.5%	16.2%	161.627.88	Saigon Beer Alcohol Beverage	151800.00	-0.9%	-22.2%	27616.32
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn <u>đ</u> )	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn <u>đ</u> )
Vietnam Prosperity	63600.00	63600.00	0.0%	956.026.32	Hoa Phat Group	48650.00	48650.00	0.0%	1246307.82
Vietjet Aviation	118000.00	118000.00	0.0%	63095.77	Military Commercial Bank	29600.00	29600.00	0.0%	331.121.09
Vingroup JSC	110900.00	110900.00	0.0%	235943.70	Vietnam National Petroleum Group	52900.00	52900.00	0.0%	148947.11
Vinhomes	120000.00	120000.00	0.0%	1210690.71	PetroVietnam Power Corp	11300.00	11300.00	0.0%	111802.68
Techcombank	52200.00	52200.00	0.0%	796356.27	Sai Gon Thuong Tin Commercial	29700.00	29700.00	0.0%	676.529.72

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

#### DISCLAIMER

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.

