

# Daily Market Report

## 17 August 2021

### JSE

JSE All-Share Index declined by 0.81% to close at 68,824.69 points on Monday, as the Industrial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 171.10 points, up by 0.35% on Monday with Solibra Côte d'Ivoire and Bank of Africa - Senegal being the top gainers.

### NSE

NSE All-Share decreased marginally by 0.04% to close at 39,505.40 points on Monday, as the Oil & Gas, Banking and Industrial sectors recorded losses.

### EGX

EGX 30 Index was up by 0.15% and closed at 11,046.15 points on Monday, as the market gained LE 775.24 million of market cap, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index closed at 944.35 points on Monday, as it declined by 0.14%.

## African Markets

**Nigeria:** NSE 30 Index decreased marginally by 0.09% and closed at 1,636.57 points on Monday. Fidelity and Ecobank were the top losers.

**Egypt:** EGX 30 Index was up by 0.15% and closed at 11,046.15 points on Monday, as the market gained LE 775.24 million of market cap, amid Arab and foreign buying.

**Kenya:** NSE 20 Index increased by 0.62% and closed at 1,973.23 points on Monday. Nairobi Securities Exchange and Kengen were the top gainers.

**South Africa:** JSE Top 40 Index fell 1.05% to close at 62,607.03 points on Monday, as the Industrial and Resources sectors recorded losses.

## Capital Markets

### JSE

Johannesburg Stock Exchange

▼ 0.81%

### BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.35%

### NSE

Nigerian Stock Exchange

▼ 0.04%

### EGX

Egyptian Stock Exchange

▲ 0.15%

### ESG

Casablanca Stock Exchange

▼ 0.14%

## Nigeria Key Indicators

	Current
Inflation	17.75%
Exchange Rate	₦ 410.11

## INTERBANK RATES

OBB	17.00 ▲
Overnight	17.50 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.81% to close at 7,662.86 points on Monday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index jumped 1.09% to close at 402.71 points.

**Vietnam:** VN-30 Index rose 1.11% to close at 1,500.77 points on Monday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.19% to close at 1,037.43 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.26% to close at 11,321.85 points on Monday, as losses in the Insurance, Hotels & Tourism and Petrochemicals sectors pushed the shares lower. MSCI Tadawul 30 Index slipped 0.08% to close at 1,532.68 points.

**India:** Nifty 50 increased by 0.21% to close at 16,563.05 points on Monday, as gains in the Metals, Oil & Gas and Green Energy sectors pushed the shares higher. MSCI India increased by 0.25% to close at 1,913.18 points.

## News

### Nigeria:

Nigeria's Buhari Signs Law to Overhaul Oil Industry  
FG's Funding for Priority Projects in Oil Industry Hits \$1.54trn Deficit in June  
Nigeria Pumps Addn. 45k bpd Crude Oil in July as FG Activates Two More Oil Rigs

### Kenya:

Kenya Forex Reserves Drop to 7 Week-Low of \$9.3 Billion  
Kenya to increase cash threshold for foreign investors  
KRA Tax Collection in July hits KSh 121.8 Billion

### Abu Dhabi:

Waha Capital secures new \$500 million revolving credit facility  
Khalifa Fund issued Dhs1.32 billion in finances, created 15,000 jobs  
Dubai-based Damac narrows losses in second quarter

### Saudi Arabia:

Saudi Aramco aims to raise at least \$17bln from gas pipeline -sources  
Saudi Aramco in advanced talks with India's Reliance for \$25bln deal  
Saudi media group SRMG profit jumps 62% to \$60.3m in H1

### Egypt:

Orascom Development records profits of LE 744.58M in H121  
Fawry hits profits of LE 137.13M during H121  
Raya Holding turns to profits in H1

### South Africa:

BHP nears oil and gas exit as climate scrutiny intensifies  
Absa warns about pace of SA's recovery as it reinstates dividends  
Implats expects full-year profit to double due to higher metals prices

### India:

WPI inflation eases to 11.16% in July; food, crude prices soften  
India's overseas listing rules for companies delayed due to tax concerns  
Corp bond issuances fall 51% in April-July on fewer PSU issues

### Vietnam:

Vietnam aims to connect 5 mn farming households to e-commerce platforms  
Cash registers at select businesses to connect to tax authorities by 2022  
VN to keep CPI growth low by end of 2021

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,662.86	0.8%	0.9%	3.6%	51.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,046.15	0.2%	1.5%	2.2%	1.9%	EGP/USD	15.69	-0.1%	-0.3%
India	16,563.05	0.2%	0.2%	5.1%	18.5%	INR/USD	74.25	0.0%	1.6%
Kenya	1,973.23	0.6%	0.6%	-0.1%	5.6%	KES/USD	109.40	0.1%	0.2%
Nigeria	1,636.57	-0.1%	-0.1%	-0.2%	-0.2%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	11,321.85	-0.3%	-0.02%	2.3%	30.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,607.03	-1.0%	-1.0%	-0.4%	15.1%	ZAR/USD	14.78	0.4%	0.6%
Vietnam	1,500.77	1.1%	1.1%	3.7%	40.2%	VND/USD	22,835.00	0.0%	-1.1%

## MSCI Emerging Markets

MSCI Frontier	657.17	0.1%	0.1%	2.4%	15.0%	Brent Crude (\$)	69.51	-1.5%	34.2%
MSCI Frontier 100	1,474.67	0.1%	0.1%	2.5%	17.2%	Gold (\$)	1,789.80	0.7%	-5.6%
MSCI Emerging	1,272.19	-0.7%	-0.7%	-0.4%	-1.5%	Copper (\$)	9,442.00	-1.3%	21.6%
MSCI World (USD)	3,121.99	-0.1%	-0.1%	1.7%	16.1%	Coffee (\$)	160.06	-1.9%	34.3%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FCMB	3.14	4.0%	-5.7%	7.72	Fidelity	2.38	-4.8%	-5.6%	24.33
Dangote Sugar	17.95	2.6%	2.0%	10.15	Cap	19.50	-3.5%	-2.5%	8.20
Wema	0.81	2.5%	17.4%	2.35	Ecobank	5.60	-1.8%	-6.7%	6.51
UACN	10.25	2.0%	41.4%	2.37	Lafarge Africa	22.00	-1.3%	4.5%	20.00
P Z Cussons	6.00	0.8%	13.2%	6.86	Sterling	1.51	-1.3%	-26.0%	8.65
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	199.20	199.20	0.0%	7.07	UBN	5.20	4.65	11.8%	1.00
Seplat Petroleum	759.70	759.70	0.0%	0.75	Transcorp Hotels	3.92	3.25	20.6%	0.00
P Z Cussons	6.00	6.00	0.0%	6.86	Cap	19.50	15.25	27.9%	8.20
Okomu Oil	110.00	110.00	0.0%	0.48	Sterling	1.51	1.13	33.6%	8.65
Nestle	1540.00	1540.00	0.0%	491.95	Custodian	6.25	4.55	37.4%	0.05

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Qudra Holding	2.28	14.0%	107.3%	6.58	Gulf Cement	0.74	-7.9%	-11.3%	0.01
Ras Al Khaimah Cement	3.25	13.2%	314.0%	36.25	RAK Properties PJSC	0.67	-4.0%	39.6%	16.29
Fujairah Cement Industries	0.56	9.8%	-57.6%	2.07	Manazel PJSC	0.37	-2.6%	6.9%	2.82
RAK Co. for White Cement & Construction	0.97	9.3%	14.7%	0.00	Bank of Sharjah PJSC	0.53	-1.9%	-15.9%	0.43
National Takaful Company	1.00	8.6%	0.0%	0.00	Eshraq Investments	0.32	-1.6%	-0.9%	2.63
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
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Al Ain Ahlia Ins.	31.20	31.20	0.0%	0.00
Invest Bank PSC	0.45	0.45	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	2.21	5.7%	55.6%	72.52	Cairo For Investment And Real Estate Dev.	11.52	-2.6%	-19.2%	0.12
Credit Agricole Egypt	26.03	2.8%	-10.3%	36.60	GB AUTO	3.93	-2.2%	18.4%	10.16
Orascom Development Egypt	5.20	2.0%	6.1%	10.60	Alexandria Mineral Oils Company	3.67	-2.1%	17.6%	3.94
Egyptian Financial Group-HermesHolding Company	11.68	1.5%	-20.2%	19.39	Heliopolis Housing	4.97	-2.0%	-18.5%	5.57
Speed Medical	2.29	1.3%	40.5%	62.83	Ibnsina Pharma	3.98	-1.7%	-21.8%	3.64
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	14.88	14.88	0.0%	10.61	Commercial International Bank	46.69	46.69	0.0%	89.86
Sidi Kerir Petrochemicals	11.03	11.03	0.0%	8.55	GB AUTO	3.93	3.93	0.0%	10.16
Pioneers Holding	5.04	5.04	0.0%	10.11	Medinet Nasr Housing	3.14	3.14	0.0%	12.99
Oriental Weavers	8.29	8.29	0.0%	2.11	Palm Hills Development Company	1.74	1.74	0.0%	4.04
MM Group For Industry AndInternational Trade	7.71	7.71	0.0%	3.25	T M G Holding	7.07	7.07	0.0%	4.00

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Steel	1515.30	3.7%	135.4%	40760.125	Maruti Suzuki India	6820.35	-2.6%	-10.8%	5166.37
Bajaj Finance	6363.05	3.4%	20.2%	8940.84	Shree Cement limited	26000.00	-2.3%	8.3%	1958.79
Mahindra & Mahindra	799.25	2.7%	10.9%	5675.02	Eicher Motors	2490.00	-2.2%	-1.6%	2573.14
Britannia Inds.	3668.00	2.5%	2.6%	1265.31	Power Grid Corp Of India	181.05	-2.0%	-4.6%	2911.35
Indian Oil	107.05	2.3%	17.7%	2316.16	Bajaj Auto	3750.00	-2.0%	8.9%	1108.64
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Hcl Technologies	1122.00	1129.35	-0.7%	3550.51	Hero Motocorp	2745.00	2740.00	0.2%	1091.70
Tata Consultancy Svs.	3464.75	3494.35	-0.8%	7230.54	Maruti Suzuki India	6820.35	6270.15	8.8%	5166.37
Infosys	1702.95	1722.50	-1.1%	7776.56	Britannia Inds.	3668.00	3317.30	10.6%	1265.31
Larsen & Toubro	1657.95	1677.05	-1.1%	2982.21	Dr Reddys Lab	4660.00	4135.00	12.7%	1948.43
Titan Company	1837.00	1858.65	-1.2%	845.66	Reliance Industries	2169.00	1830.00	18.5%	22042.26

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	8.82	4.3%	8.1%	0.03	East African Breweries Limited	177.00	-1.1%	14.7%	141.90
Kengen Limited	4.17	3.0%	-11.5%	0.48	NCBA Group Plc	25.30	-0.4%	-5.4%	2.02
Kenya Power & Lighting Limited	1.40	2.9%	-18.1%	0.50	Diamond Trust Bank Limited	64.25	-0.4%	-14.3%	5.02
KCB Group Plc	48.10	2.0%	26.2%	52.37	WPP Scangroup Plc	4.35	-0.2%	-27.5%	0.06
Total Kenya Ltd	24.95	1.8%	4.0%	0.06					
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	48.10	48.60	-1.0%	52.37	WPP Scangroup Plc	4.35	4.31	0.9%	0.06
Equity Group Holdings Plc	51.00	51.75	-1.4%	9.28	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	5.67
Safaricom Plc	43.60	44.25	-1.5%	253.66	Kengen Limited	4.17	3.90	6.9%	0.48
The Cooperative Bank of Kenya Ltd	13.80	14.05	-1.8%	2.28	Centum Investment Company Plc	15.55	14.05	10.7%	0.28
Nation Media Group	25.00	26.50	-5.7%	5.78	Diamond Trust Bank Limited	64.25	57.50	11.7%	5.02

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Amana Cooperative Insurance Co.	60.00	6.6%	61.5%	19.09	Al Sagr Coop Insurance Co.	17.04	-3.6%	9.4%	25.21
Saudi Enaya Cooperative Insurance Co.	45.00	4.2%	30.4%	23.46	National Company for Learning and Education	67.70	-3.6%	29.7%	43.56
Alujain Holding Corp.	66.50	3.7%	41.3%	99.67	Mouwasat Medical Services Co.	195.60	-3.6%	41.7%	19.73
National Gas and Industrialization Co.	47.95	2.8%	57.2%	83.51	Ataa Educational Co.	69.70	-3.5%	76.5%	122.22
Sahara International Petrochemical Co.	34.10	2.3%	96.9%	153.96	Southern Province Cement Co.	75.30	-3.2%	-10.7%	40.57
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	68.00	68.00	0.0%	75.87	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.30	60.30	0.0%	364.24	BinDawood Holding Co.	107.40	105.60	1.7%	11.67
Zamil Industrial Investment Co.	38.30	38.30	0.0%	17.46	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	48.40	48.40	0.0%	18.63	Savola Group	40.20	36.60	9.8%	33.39
United Electronics Co.	134.00	134.00	0.0%	24.54	Saudi Airlines Catering Co.	80.00	70.50	13.5%	41.26

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	12999.00	8.5%	116.0%	124846.33	Naspers Ltd	260000.00	-7.4%	-13.9%	2153047.52
Discovery Ltd	12859.00	4.5%	-16.2%	25335.65	Prosus	124265.00	-5.1%	-22.6%	2012273.60
Sanlam Limited	6209.00	3.7%	5.7%	32913.32	Sasol Limited	20664.00	-5.0%	54.3%	89795.25
Firstrand Ltd	5957.00	3.5%	16.7%	87842.61	Redefine Properties	417.00	-1.9%	25.2%	1850.56
Bidvest Group	20162.00	3.5%	28.4%	25248.71	Anglo American	67666.00	-1.8%	40.1%	148446.01
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)
Capitec Bank	176900.00	177000.00	-0.1%	50507.25	Naspers Ltd	260000.00	247868.00	4.9%	2153047.52
Firstrand Ltd	5957.00	5964.00	-0.1%	87842.61	Anglogold Ashanti	23766.00	22600.00	5.2%	37790.51
Mr Price Group	23864.00	23899.00	-0.1%	43883.27	Brit.Amer.Tobacco	54750.00	50757.00	7.9%	38739.84
Investec Plc	5823.00	5860.00	-0.6%	7342.88	Prosus	124265.00	114101.00	8.9%	2012273.60
Mondi	41975.00	42260.00	-0.7%	15603.32	Gold Fields	13321.00	12193.00	9.3%	33420.47

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vietnam Rubber Group JSC	37200.00	6.9%	24.2%	390838.08	Vinhomes	116000.00	-3.3%	332.8%	2.195.147.41
Saigon Securities Inc	62100.00	5.3%	196.4%	1045590.19	Vietnam National Petroleum Group	52100.00	-1.5%	-2.6%	54908.36
Military Commercial Bank	31000.00	4.7%	83.6%	968.069.42	Vietjet Aviation	117300.00	-0.6%	31.1%	56215.49
Techcombank	54000.00	3.5%	219.5%	1611070.48	Mobile World Inv. Corp	170100.00	-0.5%	43.1%	174.566.10
Vietnam Prosperity	65600.00	3.1%	-47.5%	1021744.42	Vinamilk	89500.00	-0.4%	-17.3%	292892.38
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	65600.00	65600.00	0.0%	1021744.42	Military Commercial Bank	31000.00	31000.00	0.0%	968.069.42
Vietjet Aviation	117300.00	117300.00	0.0%	56215.49	Vietnam National Petroleum Group	52100.00	52100.00	0.0%	54908.36
Vingroup JSC	110600.00	110600.00	0.0%	343.611.10	PetroVietnam Power Corp	11450.00	11450.00	0.0%	108.125.74
Vinhomes	116000.00	116000.00	0.0%	2.195.147.41	Sai Gon Thuong Tin Commercial	30300.00	30300.00	0.0%	720.532.97
Techcombank	54000.00	54000.00	0.0%	1611070.48	Tien Phong Commercial Joint Stock Bank	37100.00	37100.00	0.0%	249684.84

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