

Daily Market Report

18 August 2021

JSE

JSE All-Share Index increased by 0.17% to close at 68,939.81 points on Tuesday, as the Financial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 172.77 points, up by 0.98% on Tuesday with CIE Côte d'Ivoire and Bank of Africa - Niger being the top gainers.

NSE

NSE All-Share increased by 0.11% to close at 39,550.36 points on Tuesday, as the Industrial sector recorded gains.

EGX

EGX 30 Index declined by 0.98% and closed at 10,937.69 points on Tuesday, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 946.99 points on Tuesday, as it increased by 0.28%.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.17%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.98%
NSE Nigerian Stock Exchange	▲ 0.11%
EGX Egyptian Stock Exchange	▼ 0.98%
ESG Casablanca Stock Exchange	▲ 0.28%

African Markets

Nigeria: NSE 30 Index inched up by 0.04% and closed at 1,637.16 points on Tuesday. Dangote Cement and Fidelity were the top gainers.

Egypt: EGX 30 Index declined by 0.98% and closed at 10,937.69 points on Tuesday, amid Egyptian selling.

Kenya: NSE 20 Index jumped by 1.17% and closed at 1,996.26 points on Tuesday. Stanbic Holdings and Equity Group Holdings were the top gainers.

South Africa: JSE Top 40 Index increased marginally by 0.08% to close at 62,657.34 points on Tuesday, as the Financial and Resources sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.11
INTERBANK RATES	
OBB	17.00 ↔
Overnight	17.67 ▲

Other Emerging Markets

Abu Dhabi: ADX General rose 0.87% to close at 7,729.87 points on Tuesday, as International Holding Company and First Abu Dhabi Bank recorded gains. MSCI UAE Index climbed 1.18% to close at 407.46 points.

Vietnam: VN-30 Index decreased by 0.44% to close at 1,494.12 points on Tuesday, as the blue chip companies recorded losses. MSCI Vietnam declined 0.24% to close at 1,034.95 points.

Saudi Arabia: Tadawul All Share Index increased by 0.63% to close at 11,392.83 points on Tuesday, as gains in the Telecoms & IT, Insurance and Financial Services sectors pushed the shares higher. MSCI Tadawul 30 Index rose 0.91% to close at 1,546.64 points.

India: Nifty 50 increased by 0.31% to close at 16,614.60 points on Tuesday, as gains in the IT, Technology and Healthcare sectors pushed the shares higher. MSCI India rose 0.61% to close at 1,924.76 points.

News

Nigeria:

Experts raise concern as Nigeria's inflation falls to 17.38%
Nigeria's Bank of Industry Plans \$883 Million Eurobond Sale
NNPC: Oil, Gas Exports Hit \$1.6bn in One Year, April Sales Fall by 60%

Kenya:

Equity Bank half-year profit hits record Sh17.9bn
Equity Bank now inches closer to risk-based loaning
Record Sh96bn bank profit signals return of dividends

Abu Dhabi:

Etisalat raises stake in West African telco to 53%
Mubadala Capital closes equity fund with total commitments of \$1.6b
Abu Dhabi removes US, Israel, Maldives, Italy from green list

Saudi Arabia:

Saudi PIF raises stake in US equities to \$15.9 bn after Activision deal
Saudi National Bank's investment arm and BNY Mellon to bring global securities services in KSA
Saudi gets green light on clean hydrogen

Egypt:

Egypt sells 622mln in euro-denominated T-bills - CBE
Egypt receives \$282mln loan from Arab Monetary Fund
Elsawedy Electric records profits of LE 1.74B in H1 2021

South Africa:

JPMorgan launches R300m fund for black-owned firms in SA
BHP agrees to exit oil business, approves giant new potash mine
Northam flags annual earnings to likely surge by more than 300%

India:

HCL has signs five year deal with German chemical firm Wacker Chemie AG
JSW Infra Plans Rs 10K cr Capex, To Raise \$400 million via bond issue
Sebi cuts lock-in period for promoters to 18 months post-IPO

Vietnam:

Central gov't to ramp up disbursement rate of public investment
Transport Ministry directs to ease operation of seaports amid pandemic
Ben Tre earmarks over 2.19 million USD for trade promotion activities

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,729.87	0.9%	1.8%	4.6%	53.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,937.69	-1.0%	0.5%	1.2%	0.9%	EGP/USD	15.71	0.1%	-0.2%
India	16,614.60	0.3%	0.5%	5.4%	18.8%	INR/USD	74.35	0.1%	1.8%
Kenya	1,996.26	1.2%	1.8%	1.1%	6.8%	KES/USD	109.45	0.0%	0.2%
Nigeria	1,637.16	0.04%	-0.1%	-0.1%	-0.2%	NGN/USD	412.00	0.1%	4.4%
Saudi Arabia	11,392.83	0.6%	0.6%	2.9%	31.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	62,657.34	0.1%	-1.0%	-0.3%	15.2%	ZAR/USD	14.97	1.3%	1.9%
Vietnam	1,494.12	-0.4%	0.7%	3.2%	39.5%	VND/USD	22,832.50	0.0%	-1.1%

MSCI Emerging Markets

MSCI Frontier	657.38	0.0%	0.2%	2.4%	15.0%	Brent Crude (\$)	69.07	-0.7%	33.3%
MSCI Frontier 100	1,474.42	0.0%	0.1%	2.5%	17.2%	Gold (\$)	1,787.80	-0.1%	-5.7%
MSCI Emerging	1,255.78	-1.3%	-2.0%	-1.7%	-2.7%	Copper (\$)	9,247.50	-2.1%	19.1%
MSCI World (USD)	3,100.12	-0.7%	-0.8%	1.0%	15.2%	Coffee (\$)	160.76	0.4%	34.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.84	3.7%	21.7%	3.09	Nestle	1400.00	-9.1%	-7.0%	2173.99
Dangote Cement	249.60	3.3%	1.9%	144.95	Unilever	15.00	-3.5%	7.9%	8.41
UACN	10.45	2.0%	44.1%	7.38	Axamansard	0.88	-2.2%	-16.2%	2.38
Fidelity	2.42	1.7%	-4.0%	6.71	Ecobank	5.55	-0.9%	-7.5%	2.88
Sterling	1.53	1.3%	-25.0%	1.23	Zenith	24.20	-0.2%	-2.4%	85.90
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	10.45	10.45	0.0%	7.38	UBN	5.20	4.65	11.8%	1.58
Total	199.20	199.20	0.0%	1.32	Transcorp Hotels	3.92	3.25	20.6%	0.00
Seplat Petroleum	759.70	759.70	0.0%	0.27	Cap	19.50	15.25	27.9%	2.49
P Z Cussons	6.00	6.00	0.0%	1.15	Sterling	1.53	1.13	35.4%	1.23
Okomu Oil	110.00	110.00	0.0%	3.82	Custodian	6.25	4.55	37.4%	0.19

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi Aviation	4.85	12.0%	34.0%	10.12	Fujairah Cement Industries	0.52	-7.0%	-60.5%	0.17
Abu Dhabi National for Building Materials	0.32	5.0%	21.6%	0.04	Al Ain Ahlia Ins.	29.20	-6.4%	-21.1%	0.16
RAK Properties PJSC	0.70	4.3%	45.6%	19.85	Ras Al Khaimah Cement	3.12	-4.0%	297.5%	16.60
ZEE STORE PRJSC	13.30	3.1%	26.7%	14.47	AL YAH SATELLITE COMMUNICATIO NS COMPANY	2.60	-1.9%	-5.5%	14.61
Abu Dhabi National Oil Co.	4.49	2.5%	19.7%	79.36	Arkan Building Materials	1.23	-1.6%	39.8%	0.39
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.	29.20	29.20	0.0%	0.16
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 Zawayia 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	2.27	2.7%	59.9%	53.68	Sidi Kerir Petrochemicals	10.73	-2.7%	15.3%	27.20
Ibsina Pharma	4.05	1.8%	-20.4%	5.75	Commercial International Bank	45.49	-2.6%	-23.1%	40.18
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.95	1.7%	-22.4%	4.40	Ezz Steel	14.59	-2.1%	36.0%	14.12
Eastern Company	11.59	1.6%	-11.1%	9.07	GB AUTO	3.85	-2.0%	16.0%	6.20
Cairo For Investment And Real Estate Development	11.69	1.5%	-18.0%	0.39	Alexandria Mineral Oils Company	3.62	-1.4%	16.0%	4.72
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	15.00	15.00	0.0%	20.62	Commercial International Bank	45.49	45.49	0.0%	40.18
Sidi Kerir Petrochemicals	10.73	10.73	0.0%	27.20	GB AUTO	3.85	3.85	0.0%	6.20
Pioneers Holding	5.03	5.03	0.0%	10.93	Medinet Nasr Housing	3.11	3.11	0.0%	29.31
Oriental Weavers	8.29	8.29	0.0%	1.33	Palm Hills Development Company	1.76	1.76	0.0%	3.12
MM Group For Industry AndInternational Trade	7.63	7.63	0.0%	2.49	T M G Holding	7.10	7.10	0.0%	6.85

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Consumer products Ltd.	832.90	3.8%	41.2%	6252.409	Jsw Steel	743.25	-2.4%	92.0%	4857.17
Wipro	634.25	3.3%	64.2%	7408.74	Adani Ports And Sez.	690.95	-2.3%	42.8%	5096.43
Tech Mahindra	1410.95	3.2%	45.0%	11365.36	Tata Motors	296.95	-2.2%	61.5%	7594.60
HUL	2484.90	2.4%	3.7%	4738.24	Coal India	139.30	-1.9%	2.8%	1913.28
Nestle India Limited	18726.00	2.4%	1.8%	1397.55	UPL	760.40	-1.6%	63.1%	2210.26
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Titan Company	1877.50	1878.35	0.0%	3562.02	Hero Motocorp	2780.00	2713.00	2.5%	2409.79
Tata Consumer products Ltd.	832.90	835.00	-0.3%	6252.41	Maruti Suzuki India	6890.00	6270.15	9.9%	5130.37
Tata Consultancy Svs.	3548.00	3560.80	-0.4%	15277.62	Britannia Inds.	3681.00	3317.30	11.0%	2139.27
Wipro	634.25	637.05	-0.4%	7408.74	Dr Reddys Lab	4699.00	4135.00	13.6%	2000.54
Nestle India Limited	18726.00	18844.00	-0.6%	1397.55	Reliance Industries	2163.00	1830.00	18.2%	12659.93

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Stanbic Holdings	94.00	9.3%	10.6%	0.08	Total Kenya Ltd	24.50	-1.8%	2.1%	0.00
Equity Group Holdings Plc	53.00	3.9%	45.0%	50.82	Kenya Reinsurance Corporation Ltd	2.48	-1.2%	6.9%	0.65
KCB Group Plc	49.90	3.7%	31.0%	53.98	The Cooperative Bank of Kenya Ltd	13.70	-0.7%	9.6%	13.73
Nairobi Securities Exchange Plc	9.10	3.2%	11.5%	0.07	Kenya Power & Lighting Limited	1.39	-0.7%	-18.7%	0.12
Safaricom Plc	44.90	3.0%	31.1%	537.26	Diamond Trust Bank Limited	64.00	-0.4%	-14.7%	32.42
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)
Stanbic Holdings	94.00	94.50	-0.5%	0.08	WPP Scangroup Plc	4.37	4.31	1.4%	0.31
Safaricom Plc	44.90	45.25	-0.8%	537.26	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	18.52
Equity Group Holdings Plc	53.00	53.50	-0.9%	50.82	Kengen Limited	4.19	3.90	7.4%	1.44
KCB Group Plc	49.90	50.75	-1.7%	53.98	Centum Investment Company Plc	15.50	14.05	10.3%	0.59
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	13.73	Diamond Trust Bank Limited	64.00	57.50	11.3%	32.42

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Mouwasat Medical Services Co.	208.40	6.5%	51.0%	40.98	Amana Cooperative Insurance Co.	57.90	-3.5%	55.9%	18.59
United Cooperative Assurance Co.	30.00	4.5%	75.4%	105.85	Saudi Industrial Export Co.	109.80	-3.2%	-1.6%	13.53
Saudi Paper Manufacturing Co.	64.50	4.4%	-0.2%	47.03	Tihama Advertising and Public Relations Co.	49.90	-3.1%	-3.7%	22.44
Abdullah Saad Mohammed Abo Moati for Bookstores Co.	54.70	4.2%	2.2%	307.08	Alandalus Property Co.	30.80	-2.7%	45.4%	41.94
Amlak International for Real Estate Finance Co	24.20	3.3%	10.5%	178.94	Saudi Enaya Coop Insurance Co.	43.90	-2.4%	27.2%	17.04
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	67.00	67.00	0.0%	43.44	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.40	60.40	0.0%	179.86	BinDawood Holding Co.	108.40	105.60	2.7%	18.87
Zamil Industrial Investment Co.	38.00	38.00	0.0%	13.89	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	134.00	134.00	0.0%	13.12	Savola Group	40.40	36.60	10.4%	23.16
United Cooperative Assurance Co.	30.00	30.00	0.0%	105.85	Saudi Airlines Catering Co.	80.20	70.50	13.8%	35.65

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
BHP Group	48699.00	4.7%	25.2%	123331.87	Naspers Ltd	238984.00	-8.1%	-20.8%	7756028.32
Woolworths Hdq.	6149.00	3.9%	55.5%	36592.71	Nedbank Group	17531.00	-0.8%	35.4%	65391.51
Anglogold Ashanti	24655.00	3.7%	-28.0%	69283.71	Firststrand Ltd	5915.00	-0.7%	15.9%	158545.75
Capitec Bank	182250.00	3.0%	27.2%	119626.17	Investec Ltd	5871.00	-0.5%	55.9%	6598.14
Sibanye Stillwater	6403.00	2.9%	6.7%	103773.44	Mr Price Group	23761.00	-0.4%	39.2%	44010.69
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	182250.00	182857.00	-0.3%	119626.17	Naspers Ltd	238984.00	234080.00	2.1%	7756028.32
Woolworths Hdq.	6149.00	6175.00	-0.4%	36592.71	Anglogold Ashanti	24655.00	22600.00	9.1%	69283.71
Mondi (JSE)	42127.00	42431.00	-0.7%	17947.62	Prosus	125000.00	114101.00	9.6%	3453905.88
Clicks Group	29286.00	29499.00	-0.7%	40736.94	Brit.Amer.Tobacco	55672.00	50757.00	9.7%	39235.68
Investec Plc	5808.00	5860.00	-0.9%	8172.07	Gold Fields	13603.00	12193.00	11.6%	70240.00

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Hoa Phat Group JSC	50400.00	1.9%	65.1%	2,283.730.60	Vingroup JSC	98900.00	-10.6%	1.0%	491308.59
Phu Nhuan Jewelry	95500.00	1.1%	19.0%	30.053.83	Vinhomes	111000.00	-4.3%	314.2%	2.251.507.05
Vietnam Rubber Group JSC	37500.00	0.8%	25.2%	283.313.66	Saigon Beer Alcohol Beverage	145500.00	-4.0%	-25.4%	82944.16
Tien Phong Commercial Joint Stock Bank	37350.00	0.7%	18.6%	180.255.53	Petrovietnam Gas	92400.00	-1.9%	10.1%	105.261.00
Military Commercial Bank	31200.00	0.7%	84.8%	578396.56	Vincom Retail	28050.00	-1.6%	-74.0%	109.593.33
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	65100.00	65100.00	0.0%	743916.70	Military Commercial Bank	31200.00	31200.00	0.0%	578396.56
Vietjet Aviation	117300.00	117300.00	0.0%	60435.44	Vietnam National Petroleum Group	51600.00	51600.00	0.0%	70.153.94
Vingroup JSC	98900.00	98900.00	0.0%	491308.59	PetroVietnam Power Corp	11350.00	11350.00	0.0%	75075.78
Vinhomes	111000.00	111000.00	0.0%	2.251.507.05	Saigon Beer Alcohol Beverage	145500.00	145500.00	0.0%	82944.16
Techcombank	53300.00	53300.00	0.0%	860.409.43	Sai Gon Thuong Tin Commercial	30150.00	30150.00	0.0%	615780.58

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.