

Daily Market Report

19 August 2021

JSE

JSE All-Share Index dropped by 1.50% to close at 67,905.69 points on Wednesday, as the Resources sector recorded losses.

BRVM

BRVM Composite Index closed at 173.76 points, up by 0.57% on Wednesday with Solibra Côte d'Ivoire and CIE Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched down 0.01% to close at 39,545.67 points on Wednesday, as the insurance sector recorded losses.

EGX

EGX 30 Index declined by 0.27% and closed at 10,907.96 points on Wednesday, as the market lost LE 394.9 million of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 945.68 points on Wednesday, as it declined by 0.14%.

African Markets

Nigeria: NSE 30 Index slipped by 0.01% and closed at 1,636.97 points on Wednesday. Access and Ecobank were the top losers.

Egypt: EGX 30 Index declined by 0.27% and closed at 10,907.96 points on Wednesday, as the market lost LE 394.9 million of market cap, amid foreign selling.

Kenya: NSE 20 Index increased by 0.23% and closed at 2,000.76 points on Wednesday. NCBA Group and Equity Group Holdings were the top gainers.

South Africa: JSE Top 40 Index dropped by 1.67% to close at 61,608.96 points on Wednesday, as the Resources sector recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 1.50%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.57%

NSE

Nigerian Stock Exchange ▼ 0.01%

EGX

Egyptian Stock Exchange ▼ 0.27%

ESG

Casablanca Stock Exchange ▼ 0.14%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.11
INTERBANK RATES	
OBB	17.50 ▲
Overnight	17.88 ▲

Other Emerging Markets

Abu Dhabi: ADX General declined by 0.46% to close at 7,694.59 points on Wednesday, as Alpha Dhabi Holding and First Abu Dhabi Bank recorded losses. MSCI UAE Index declined marginally by 0.09% to close at 407.07 points.

Vietnam: VN-30 Index declined by 0.31% to close at 1,489.54 points on Wednesday, as the blue chip companies recorded losses. MSCI Vietnam decreased marginally by 0.05% to close at 1,034.46 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.42% to close at 11,344.94 points on Wednesday, as losses in the Transport, Telecoms & IT and Energy & Utilities sectors pushed the shares lower. MSCI Tadawul 30 Index fell 0.56% to close at 1,537.99 points.

India: Nifty 50 decreased by 0.28% to close at 16,568.85 points on Wednesday, as losses in the Banking, Metals and Real Estate sectors pushed the shares lower. MSCI India was down by 0.10% to close at 1,922.88 points.

News

Nigeria:

FEC Okays N21.1bn Contracts for Aviation, Education, Four Agencies
FCMB Supports PSP Operators with N3bn Loan
NNPC, partners sign contract for 50MW Maiduguri power project

Kenya:

Co-op Bank of Kenya Half-Year Earnings up 3% to KSh 7.4 Billion
TotalEnergies Six-Month Profit Climbs 50% to KSh1.7 Billion
MPs snub Bill seeking M-Pesa, Safaricom split

Abu Dhabi:

UAE's Fujairah Oil Terminal secures \$280mln refinancing
UAE's Etisalat will fully acquire Etisalat Investment North Africa for \$505mln
Demand for villas in UAE rises as residents seek bigger homes

Saudi Arabia:

Saudi retailer BinDawood to expand after record profit margins, says CEO
Al Kathiri Holding's H1 profits leap 212.5%
Watani Iron Steel records 64% higher profits in H1

Egypt:

Egypt to receive €151.5 mln fund from Germany to finance 15 projects in 8 sectors
Palm Hills Developments records 76% profit surge in H1
EFG Hermes reports 78.5% profit hike in H1

South Africa:

Inflation edges down to 4.6% in July
Average debt-to-income ratio reaches its highest level
Old Mutual raises provisions for Covid-19 death claims by R2bn

India:

Cabinet gives nod to Rs 11,040cr palm oil plan to cut imports
HDFC Bank raises \$1bn from AT-1 bonds
Tata Power-DDL, Siemens Limited tie up for deploying 2 lakh smart electricity metres

Vietnam:

Vietnam's CBU car imports in seven months surge despite COVID-19
Vietnam poised to become world's leading seafood processing centre
Ca Mau eyes annual growth of 8% in agricultural exports

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,694.59	-0.5%	1.3%	4.1%	52.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,907.96	-0.3%	0.2%	0.9%	0.6%	EGP/USD	15.71	0.0%	-0.2%
India	16,568.85	-0.3%	0.2%	5.1%	18.5%	INR/USD	74.25	-0.1%	1.6%
Kenya	2,000.76	0.2%	2.0%	1.3%	7.1%	KES/USD	109.50	0.0%	0.3%
Nigeria	1,636.97	-0.01%	-0.1%	-0.1%	-0.2%	NGN/USD	412.00	0.0%	4.4%
Saudi Arabia	11,344.94	-0.4%	0.2%	2.5%	30.6%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,608.96	-1.7%	-2.6%	-2.0%	13.3%	ZAR/USD	14.96	-0.1%	1.9%
Vietnam	1,489.54	-0.3%	0.4%	2.9%	39.1%	VND/USD	22,808.50	-0.1%	-1.2%

MSCI Emerging Markets

MSCI Frontier	656.61	-0.1%	0.1%	2.3%	14.9%	Brent Crude (\$)	68.23	-1.2%	31.7%
MSCI Frontier 100	1,475.25	0.1%	0.1%	2.5%	17.3%	Gold (\$)	1,784.40	-0.2%	-5.8%
MSCI Emerging	1,261.60	0.5%	-1.5%	-1.3%	-2.3%	Copper (\$)	9,042.50	-2.2%	16.4%
MSCI World (USD)	3,078.01	-0.7%	-1.5%	0.3%	14.4%	Coffee (\$)	157.74	-2.1%	32.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.86	2.4%	24.6%	3.91	Access	9.00	-1.1%	6.5%	47.64
UBA	7.65	1.3%	-11.6%	38.14	Ecobank	5.50	-0.9%	-8.3%	6.75
Transnational Corporation	0.96	1.1%	6.7%	13.53	FBNH	7.35	-0.7%	2.8%	34.22
UBN	5.25	1.0%	-1.9%	1.50	United Capital PLC	6.92	-0.4%	65.9%	12.65
Guinness	31.80	1.0%	67.4%	45.37					
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%	6.07	UBN	5.25	4.65	12.9%	1.50
Total	199.20	199.20	0.0%	2.86	Transcorp Hotels	3.92	3.25	20.6%	0.0
Seplat Petroleum	759.70	759.70	0.0%	171.69	Cap	19.50	15.25	27.9%	0.29
P Z Cussons	6.00	6.00	0.0%	1.00	Sterling	1.54	1.13	36.3%	1.00
Okomu Oil	110.00	110.00	0.0%	7.15	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)
Fujairah Cement Industries	0.57	8.6%	-57.1%	0.00	Abu Dhabi National for Building Materials	0.30	-4.8%	15.8%	0.25
Easylease motorcycle rentals	37.50	7.0%	113.1%	5.41	Sudatel Telecom	0.38	-3.9%	-9.6%	0.01
Arkan Building Materials	1.31	6.5%	48.9%	22.14	Abu Dhabi Aviation	4.68	-3.5%	29.3%	2.72
Al Qudra Holding	2.34	4.0%	112.7%	0.90	Emirates Telecom	24.76	-2.5%	46.5%	63.24
RAK Properties PJSC	0.73	3.7%	51.0%	30.92	Methaq Takaful Ins.	0.95	-2.5%	9.0%	3.56
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	37.50	37.50	0.0%	5.79	Al Ain Ahlia Ins.	29.20	29.20	0.0%	0.16
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	National Bank of Fujairah	4.98	4.98	0.0%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Sharjah Group Co.	0.80	0.80	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	0.00	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£)
Raya Holding For Financial Investments	2.81	2.9%	284.9%	3.05	Egyptian for Tourism Resorts	2.18	-4.0%	53.5%	23.40
GB AUTO	3.91	1.6%	17.8%	25.92	Fawry For Banking Technology And Electronic Payment	17.59	-3.1%	-32.7%	24.79
Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	2.98	1.0%	-21.6%	4.11	Eastern Company	11.38	-1.8%	-12.7%	9.54
Commercial International Bank	45.81	0.7%	-22.6%	nse	Sidi Kerir Petrochemicals	10.56	-1.6%	13.4%	10.59
Citadel Capital - Common Shares	1.26	0.3%	-12.7%	4.08	Cleopatra Hospital Company	4.42	-1.6%	-7.1%	73.94
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	14.98	14.98	0.0%	6.63	Commercial International Bank	45.81	45.81	0.0%	29.51
Sidi Kerir Petrochemicals	10.56	10.56	0.0%	10.59	GB AUTO	3.91	3.91	0.0%	25.92
Pioneers Holding	5.00	5.00	0.0%	8.21	Medinet Nasr Housing	3.10	3.10	0.0%	21.29
Oriental Weavers	8.30	8.30	0.0%	0.39	Palm Hills Dev. Company	1.76	1.76	0.0%	5.52
MM Group For Industry And International Trade	7.57	7.57	0.0%	9.38	T M G Holding	6.99	6.99	0.0%	7.50

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Eicher Motors	2582.65	2.7%	2.0%	4899.193	Kotak Mahindra Bank	1747.00	-2.3%	-12.5%	4883.37
Ultratech Cement	7590.00	2.4%	43.5%	5514.84	Hindalco Industries	426.55	-2.3%	77.3%	5229.68
Bajaj Finance	6544.00	2.1%	23.6%	14104.20	Icici Bank	686.90	-2.0%	28.4%	7663.99
Adani Ports And Sez.	704.50	1.7%	45.6%	5148.99	SBI Life Insurance	1114.00	-1.8%	23.2%	3839.21
Grasim Industries	1505.00	1.6%	62.2%	1325.83	Tata Motors	293.15	-1.5%	59.5%	5307.67
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Nestle India Limited	18912.40	18969.00	-0.3%	753.77	Hero Motocorp	2767.10	2713.00	2.0%	1698.07
Tata Consumer products Ltd.	840.40	844.85	-0.5%	2553.17	Maruti Suzuki India	6841.60	6270.15	9.1%	2982.15
Titan Company	1875.00	1890.65	-0.8%	1927.94	Britannia Inds.	3719.00	3317.30	12.1%	1583.28
Tata Consultancy Svs.	3559.80	3595.00	-1.0%	9378.54	Dr Reddys Lab	4684.00	4135.00	13.3%	2608.64
Tech Mahindra	1412.00	1428.80	-1.2%	4153.82	Reliance Industries	2168.00	1830.00	18.5%	10091.40

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	26.15	3.0%	-2.2%	1.98	Stanbic Holdings	92.00	-2.1%	8.2%	0.47
Equity Group Holdings Plc	54.00	1.9%	47.7%	208.37	Safaricom Plc	44.20	-1.6%	29.1%	188.43
Absa Bank Kenya	10.15	1.5%	5.1%	2.53	Kengen Limited	4.14	-1.2%	-12.1%	0.63
British American Tobacco Kenya Ltd	461.00	0.9%	27.7%	0.32	WPP Scangroup Plc	4.32	-1.1%	-28.0%	0.67
Bamburi Cement Limited	38.70	0.8%	2.2%	4.63	Total Kenya Ltd	24.30	-0.8%	1.3%	0.04
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)
Equity Group Holdings Plc	54.00	54.25	-0.5%	208.37	WPP Scangroup Plc	4.32	4.30	0.5%	0.67
KCB Group Plc	49.70	50.75	-2.1%	26.87	Standard Chartered Bank Kenya Ltd	130.25	127.00	2.6%	38.65
The Cooperative Bank of Kenya Ltd	13.75	14.05	-2.1%	9.09	Kengen Limited	4.14	3.90	6.2%	0.63
Safaricom Plc	44.20	45.25	-2.3%	188.43	Centum Investment Company Plc	15.55	14.05	10.7%	2.14
Stanbic Holdings	92.00	94.50	-2.6%	0.47	Diamond Trust Bank Limited	64.00	57.50	11.3%	2.70

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
United Cooperative Assurance Co.	31.00	3.3%	81.3%	38.62	Gulf Union Alahlia	18.90	-6.6%	-7.4%	28.86
Takween Advanced Industries Co.	22.02	3.0%	57.3%	51.50	Al Sagr Coop Insurance Co.	16.00	-4.4%	2.7%	18.56
Leejam Sports Co.	90.50	2.8%	17.1%	72.16	Abdullah Saad Mohammed Abo Moati for Bookstores Co.	52.50	-4.0%	-1.9%	171.76
The National Company for Glass Industries	41.00	2.8%	49.9%	35.74	Saudi Industrial Services Co.	42.70	-3.7%	31.8%	74.54
Alinma Tokio Marine Co.	36.00	2.1%	47.7%	28.50	Fawaz Abdulaziz Alhokair Co.	21.36	-3.4%	-2.0%	25.84
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	66.00	66.00	0.0%	22.66	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.00	60.00	0.0%	122.96	BinDawood Holding Co.	108.40	105.60	2.7%	44.23
Zamil Industrial Investment Co.	36.95	36.95	0.0%	17.00	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	134.40	134.40	0.0%	7.35	Savola Group	40.00	36.60	9.3%	18.92
United Cooperative Assurance Co.	31.00	31.00	0.0%	38.62	Saudi Airlines Catering Co.	80.20	70.50	13.8%	29.82

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Old Mutual Limited	1427.00	4.2%	20.0%	22702.42	Anglo American	62415.00	-8.3%	29.2%	88148.70
Naspers Ltd	248817.00	4.1%	-17.6%	903108.42	BHP Group	45316.00	-6.9%	16.5%	63773.03
ABSA Group	15438.00	3.0%	28.8%	52209.25	Anglogold Ashanti	23510.00	-4.6%	-31.4%	34730.76
Prosus	128153.00	2.5%	-20.2%	461263.02	Gold Fields	12986.00	-4.5%	-5.6%	26217.28
Capitec Bank	186638.00	2.4%	30.3%	61837.65	Sibanye Stillwater	6179.00	-3.5%	3.0%	61912.29
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)
Aspen PhmcR.Hdg.	18861.00	18876.00	-0.1%	18192.53	Anglogold Ashanti	23510.00	22600.00	4.0%	34730.76
ABSA Group	15438.00	15471.00	-0.2%	52209.25	Naspers Ltd	248817.00	234080.00	6.3%	903108.42
Firststrand Ltd	5996.00	6010.00	-0.2%	61645.60	Gold Fields	12986.00	12193.00	6.5%	26217.28
Woolworths Hdg.	6159.00	6175.00	-0.3%	14512.35	Brit.Amer.Tobacco	55368.00	50757.00	9.1%	14153.67
Investec Plc	5837.00	5860.00	-0.4%	3770.85	Prosus	128153.00	114101.00	12.3%	461263.02

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
BaoViet Holdings	54700.00	2.1%	-17.1%	71607.83	Phat Dat Real Estate Development Corp	89000.00	-2.4%	112.3%	493875.66
Mobile World Inv. Corp	172500.00	1.5%	45.1%	148.082.59	Saigon Securities Inc	60200.00	-1.8%	187.4%	1079669.22
Masan Group Corp	134500.00	1.5%	52.6%	176749.29	Vietnam Prosperity	64000.00	-1.7%	-48.8%	905.188.97
Vinamilk	90000.00	0.8%	-16.8%	424859.89	Vingroup JSC	97900.00	-1.0%	0.0%	227397.47
Khang Dien House Trading & Investment	41500.00	0.7%	55.8%	117986.84	Techcombank	52800.00	-0.9%	212.4%	684.655.78
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	64000.00	64000.00	0.0%	905.188.97	Military Commercial Bank	31100.00	31100.00	0.0%	388.514.15
Vietjet Aviation	118000.00	118000.00	0.0%	99952.33	Vietnam National Petroleum Group	51600.00	51600.00	0.0%	52360.81
Vingroup JSC	97900.00	97900.00	0.0%	227397.47	PetroVietnam Power Corp	11400.00	11400.00	0.0%	83.240.82
Vinhomes	110000.00	110000.00	0.0%	2566484.62	Saigon Beer Alcohol Beverage	146000.00	146000.00	0.0%	50.549.25
Techcombank	52800.00	52800.00	0.0%	684.655.78	Sai Gon Thuong Tin Commercial	29950.00	29950.00	0.0%	664.044.08

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

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