

Daily Market Report

20 August 2021

JSE

JSE All-Share Index dropped 2.64% to close at 66,113.50 points on Thursday, as all the sectors recorded losses.

BRVM

BRVM Composite Index closed at 175.69 points, up by 1.11% on Thursday with Solibra Côte d'Ivoire and Bank of Africa - Côte d'Ivoire being the top gainers.

NSE

NSE All-Share increased by 0.32% to close at 39,670.29 points on Thursday, as the Insurance and Industrial sectors recorded gains.

EGX

EGX 30 Index declined by 0.91% and closed at 10,808.70 points on Thursday, as the market lost LE 5.35 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index closed at 944.94 points on Thursday, as it slipped by 0.08%.

African Markets

Nigeria: NSE 30 Index increased by 0.38% and closed at 1,643.25 points on Thursday. Lafarge Africa and MTNN were the top gainers.

Egypt: EGX 30 Index declined by 0.91% and closed at 10,808.70 points on Thursday, as the market lost LE 5.35 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased by 0.25% and closed at 2,005.77 points on Thursday. Nairobi Securities Exchange and NCBA Group were the top gainers.

South Africa: JSE Top 40 Index dropped 2.85% to close at 59,854.78 points on Thursday, as all the sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 2.64%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 1.11%

NSE Nigerian Stock Exchange ▲ 0.32%

EGX Egyptian Stock Exchange ▼ 0.91%

ESG Casablanca Stock Exchange ▼ 0.08%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.13
INTERBANK RATES	
OBB	17.67 ▲
Overnight	18.33 ▲

Other Emerging Markets

Abu Dhabi: ADX General declined by 0.97% to close at 7,620.21 points on Thursday, as Aldar Properties and First Abu Dhabi Bank recorded losses. MSCI UAE Index fell 1.54% to close at 400.79 points.

Vietnam: VN-30 Index climbed 1.04% to close at 1,505.01 points on Thursday, as the blue chip companies recorded gains. MSCI Vietnam jumped by 1.69% close at 1,051.91 points.

Saudi Arabia: Tadawul All Share Index dropped by 1.26% to close at 11,201.64 points on Thursday, as losses in the Telecoms & IT, Cement and Agriculture & Food sectors pushed the shares lower. MSCI Tadawul 30 Index fell 1.51% to close at 1,514.83 points.

India: Nifty 50 was closed on Thursday on account of Moharram.

News

Nigeria:

Nigeria Plans First Tranche of \$6.2 Billion Eurobond Next Month
Fed Govt lists N808.2m August savings bonds on stock exchange
Oil price tumbles to \$65, lowest in three months

Kenya:

KCB net profit doubles as balance sheet hits Sh1.12trn
Kenya Approves Moderna, Sinopharm Vaccines Amid Fourth Wave
National Bank posts Sh717m half year profit

Abu Dhabi:

DP World revenues stand at \$4.94 billion in the first six months
EGA refinances \$5.5 billion corporate facility to optimise capital structure
Abu Dhabi Ports' offshore arm OFCO adds 7 support vessels

Saudi Arabia:

Saudi Arabia crude exports rise to 5.965m bpd in June- JODI
Saudi retailer Fawaz Abdulaziz Alhokair swings to \$12.8m net profit
Ministry of Energy secures 12m sq. mt. of land for renewable energy projects

Egypt:

Total investments of industrial sector to hit EGP 125.7B under 2021/22 plan
Egypt's Suez Canal economic zone to house 6 ports, 4 industrial complexes
Egypt's central bank issues LE 20B in T-bills Thursday

South Africa:

Standard Bank sees recovery amid difficulty
Rand hits R15.17 to dollar – worst level since March
Economic recovery too uneven or slow for key SA sectors: SARB

India:

FPIs' investment in domestic equity surges 7% to \$592-bn in June quarter
AU Small Finance Bank shareholders okay Rs 14,500 cr debt, equity raise plan
Tata Steel announces Rs 270.28 crore annual bonus for 2020-21

Vietnam:

Finance ministry issues new law for Debt and Asset Trading Corporation
Min. of Transport scraps general aviation business licence of Globaltrans Air
Realty bond market prospers amid potential risks

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,620.21	-1.0%	0.3%	3.1%	51.0%	AED/USD	3.67	0.0%	0.0%
Egypt	10,808.70	-0.9%	-0.7%	0.0%	-0.3%	EGP/USD	15.71	0.0%	-0.2%
India	16,568.85	0.0%	0.2%	5.1%	18.5%	INR/USD	74.25	0.0%	1.6%
Kenya	2,005.77	0.3%	2.3%	1.6%	7.4%	KES/USD	109.55	0.0%	0.3%
Nigeria	1,643.25	0.4%	0.3%	0.2%	0.2%	NGN/USD	411.50	-0.1%	4.2%
Saudi Arabia	11,201.64	-1.3%	-1.1%	1.2%	28.9%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,854.78	-2.8%	-5.4%	-4.8%	10.1%	ZAR/USD	15.17	1.4%	3.2%
Vietnam	1,505.01	1.0%	1.4%	4.0%	40.6%	VND/USD	22,816.50	0.0%	-1.2%

MSCI Emerging Markets

MSCI Frontier	658.03	0.2%	0.3%	2.5%	15.1%	Brent Crude (\$)	66.45	-2.6%	28.3%
MSCI Frontier 100	1,477.61	0.2%	0.3%	2.7%	17.5%	Gold (\$)	1,783.10	-0.1%	-5.9%
MSCI Emerging	1,232.41	-2.3%	-3.8%	-3.6%	-4.6%	Copper (\$)	8,894.00	-1.6%	14.5%
MSCI World (USD)	3,063.22	-0.5%	-2.0%	-0.2%	13.9%	Coffee (\$)	158.95	0.8%	33.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Lafarge Africa	23.00	3.8%	9.3%	32.32	Nigerian Breweries	52.00	-8.8%	-7.1%	21.37
MTNN	176.50	2.6%	3.9%	543.79	Ecobank	5.30	-3.6%	-11.7%	102.12
Custodian	6.40	2.4%	9.4%	0.84	FCMB	3.03	-3.5%	-9.0%	6.17
Transnational Corporation	0.98	2.1%	8.9%	12.47	Sterling	1.52	-1.3%	-25.5%	2.51
Wema	0.87	1.2%	26.1%	1.93	United Capital PLC	6.85	-1.0%	64.3%	16.10
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%	2.56	UBN	5.25	4.65	12.9%	0.52
Total	199.20	199.20	0.0%	9.04	Transcorp Hotels	3.92	3.25	20.6%	0.00
Seplat Petroleum	759.70	759.70	0.0%	41.27	Cap	19.50	15.25	27.9%	0.06
P Z Cussons	6.00	6.00	0.0%	0.59	Sterling	1.52	1.13	34.5%	2.51
Okomu Oil	110.00	110.00	0.0%	2.68	Ecobank	5.30	3.90	35.9%	102.12

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	41.00	9.3%	133.0%	3.92	National Bank of Ras Al Khaimah	3.88	-3.0%	-0.5%	0.14
PALMS SPORTS	12.54	6.8%	-5.0%	13.56	Sharjah Cement	0.70	-2.8%	-7.9%	0.05
ZEE STORE PRJSC	14.44	4.8%	37.5%	14.44	Abu Dhabi Ship Building	3.84	-2.8%	64.8%	1.40
National Bank of Umm Al Qaiwain	1.50	3.5%	-25.0%	2.85	RAK Properties PJSC	0.71	-2.8%	46.9%	12.81
Abu Dhabi Aviation	4.79	2.4%	32.3%	9.02	Emirates Telecom	24.18	-2.3%	43.1%	62.92
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 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£)
Palm Hills Dev. Company	1.79	1.9%	31.2%	9.22	Fawry For Banking Technology And Electronic Payment	16.72	-5.0%	-36.0%	63.55
Cairo For Investment And Real Estate Development	11.79	1.1%	-17.3%	11.14	Speed Medical	2.24	-2.6%	37.4%	24.34
GB AUTO	3.94	0.8%	18.7%	4.80	Raya Holding For Fin. Investments	2.74	-2.5%	275.3%	0.86
Eastern Company	11.44	0.5%	-12.3%	nse	Alexandria Mineral Oils Company	3.54	-2.2%	13.5%	4.87
Oriental Weavers	8.34	0.5%	21.8%	7.90	Heliopolis Housing	4.89	-2.2%	-19.8%	3.25
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	14.83	14.83	0.0%	18.23	Commercial International Bank	45.39	45.39	0.0%	37.72
Sidi Kerir Petrochemicals	10.35	10.35	0.0%	21.93	GB AUTO	3.94	3.94	0.0%	4.80
Pioneers Holding	4.91	4.91	0.0%	7.73	Medinet Nasr Housing	3.05	3.05	0.0%	16.50
Oriental Weavers	8.34	8.34	0.0%	7.90	Palm Hills Dev. Company	1.79	1.79	0.0%	9.22
MM Group For Industry And International Trade	7.48	7.48	0.0%	8.62	T M G Holding	7.01	7.01	0.0%	7.06

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

*Market closed on 19/8

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	9.46	3.7%	15.9%	0.49	Equity Group Holdings Plc	52.25	-3.2%	43.0%	59.70
NCBA Group Plc	27.05	3.4%	1.1%	1.62	KCB Group Plc	48.15	-3.1%	26.4%	24.16
Standard Chartered Bank Kenya Ltd	134.50	3.3%	-6.8%	1.01	Stanbic Holdings	91.25	-0.8%	7.4%	0.08
KenGen Limited	4.21	1.7%	-10.6%	0.38	Safaricom Plc	43.85	-0.8%	28.0%	1117.95
Nation Media Group	25.30	1.4%	63.8%	0.03	WPP Scangroup Plc	4.29	-0.7%	-28.5%	0.28
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)
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	2.17	WPP Scangroup Plc	4.29	4.25	0.9%	0.28
NCBA Group Plc	27.05	27.85	-2.9%	1.62	Standard Chartered Bank Kenya Ltd	134.50	127.00	5.9%	1.01
Nairobi Securities Exchange Plc	9.46	9.74	-2.9%	0.49	KenGen Limited	4.21	3.90	7.9%	0.38
Safaricom Plc	43.85	45.25	-3.1%	1117.95	Centum Investment Company Plc	15.60	14.05	11.0%	0.53
Stanbic Holdings	91.25	94.50	-3.4%	0.08	Diamond Trust Bank Limited	64.00	57.50	11.3%	2.71

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Malath Cooperative Insurance Co.	32.30	3.2%	34.1%	144.45	Zamil Industrial Investment Co.	35.15	-4.9%	69.3%	37.35
Fawaz Abdulaziz Alhokair Co.	22.02	3.1%	1.0%	103.34	Arabian Cement	44.90	-4.7%	21.8%	30.36
Saudi Ceramic Co.	62.80	2.8%	74.6%	49.49	Arabian Pipes Co.	18.56	-4.6%	3.5%	21.09
Alahli Takaful Co.	38.40	2.4%	10.0%	22.83	Saudi Fisheries Co.	55.00	-3.9%	0.2%	34.15
United International Transportation Co.	48.75	2.2%	28.3%	28.36	Ash-Sharqiyah Development Co.	99.90	-3.8%	5.5%	49.13
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	66.40	66.40	0.0%	60.66	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	35.15	35.15	0.0%	37.35	BinDawood Holding Co.	107.60	105.60	1.9%	14.29
United International Transportation Co.	48.75	48.75	0.0%	28.36	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	133.00	133.00	0.0%	11.26	Savola Group	39.20	36.60	7.1%	39.25
United Cooperative Assurance Co.	30.60	30.60	0.0%	28.85	Saudi Airlines Catering Co.	79.40	70.50	12.6%	43.62

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Nepi Rockcastle	10255.00	3.4%	9.7%	23171.93	Sasol Limited	19708.00	-7.6%	47.2%	61337.96
Gold Fields	13427.00	3.4%	-2.4%	49034.73	Northam Platinum	20185.00	-7.5%	-3.7%	38237.50
Anglogold Ashanti	24122.00	2.6%	-29.6%	46505.67	Impala Platinum	22180.00	-7.4%	9.9%	90003.71
Clicks Group	29561.00	0.3%	17.0%	24566.70	Anglo American Platinum	157715.00	-6.2%	16.0%	48778.10
Redefine Properties	418.00	0.2%	25.5%	3015.02	Sibanye Stillwater	5825.00	-5.7%	-2.9%	125288.07
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	29561.00	29690.00	-0.4%	24566.70	Naspers Ltd	237971.00	234080.00	1.7%	718238.36
Aspen PhmcR.Hdg.	18786.00	18876.00	-0.5%	21174.34	Prosus	121076.00	114101.00	6.1%	505135.00
Investec Plc	5820.00	5860.00	-0.7%	9456.60	Anglogold Ashanti	24122.00	22600.00	6.7%	46505.67
Mondi (JSE)	42060.00	42431.00	-0.9%	14519.45	Brit.Amer.Tobacco	55238.00	50757.00	8.8%	40491.72
Firstrand Ltd	5919.00	6010.00	-1.5%	62585.11	Gold Fields	13427.00	12193.00	10.1%	49034.73

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Vingroup JSC	104000.00	6.2%	6.2%	351.297.22	Petrovietnam Gas	90900.00	-1.8%	8.3%	216.798.76
Saigon Securities Inc	62700.00	4.2%	199.3%	971198.93	Tien Phong Commercial Joint Stock Bank	36700.00	-1.5%	16.5%	117627.89
Vietnam Rubber Group JSC	38800.00	3.3%	29.5%	255.102.40	Phat Dat Real Estate Development Corp	88300.00	-0.8%	110.7%	317643.03
No Va Land Invest	104900.00	1.8%	118.1%	503.640.45	Phu Nhuan Jewelry	94000.00	-0.7%	17.2%	79296.57
Vietcombank	102800.00	1.8%	415.3%	260851.55	Asia Commercial JS Bank	35300.00	-0.7%	57.0%	330339.98
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	64600.00	64600.00	0.0%	770196.47	Military Commercial Bank	31100.00	31100.00	0.0%	647.446.40
Vietjet Aviation	120000.00	120000.00	0.0%	165.468.59	Vietnam National Petroleum Group	51500.00	51500.00	0.0%	51828.38
Vingroup JSC	104000.00	104000.00	0.0%	351.297.22	PetroVietnam Power Corp	11350.00	11350.00	0.0%	76.704.31
Vinhomes	111000.00	111000.00	0.0%	1,995.073.50	Saigon Beer Alcohol Beverage	148000.00	148000.00	0.0%	69312.12
Techcombank	53000.00	53000.00	0.0%	986.255.70	Sai Gon Thuong Tin Commercial	29950.00	29950.00	0.0%	497.564.30

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