

# Daily Market Report

## 23 August 2021

### JSE

JSE All-Share Index declined 0.15% to close at 66,011.06 points on Friday, as the Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 175.85 points, up by 0.09% on Friday with Uniwax Côte d'Ivoire and Solibra Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share decreased by 0.47% to close at 39,483.08 points on Friday, as the Consumer Goods, Oil & Gas, Banking and Industrial sectors recorded losses.

### EGX

EGX 30 Index declined by 1.09% and closed at 10,690.79 points on Sunday, as the market lost LE 2.65 billion of market cap, amid foreign selling.

### ESG

Casablanca ESG 10 Index was closed on Friday on account of Revolution Day.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▼ 0.15%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▲ 0.09%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.47%
<b>EGX</b> Egyptian Stock Exchange	▼ 1.09%
<b>ESG</b> Casablanca Stock Exchange	↔ 0.00%

### African Markets

**Nigeria:** NSE 30 Index decreased by 0.61% and closed at 1,633.23 points on Friday. International Breweries and Lafarge Africa were the top losers.

**Egypt:** EGX 30 Index declined by 1.09% and closed at 10,690.79 points on Sunday, as the market lost LE 2.65 billion of market cap, amid foreign selling.

**Kenya:** NSE 20 Index increased by 0.50% and closed at 2,015.77 points on Friday. Kengen Limited and Nairobi Securities Exchange were the top gainers.

**South Africa:** JSE Top 40 Index decreased marginally 0.09% to close at 59,800.02 points on Friday, as the Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.13
<b>INTERBANK RATES</b>	
OBB	23.33 ▲
Overnight	23.83 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX General increased by 0.77% to close at 7,679.25 points on Sunday, as Aldar Properties and International Holding Company recorded gains. MSCI UAE Index remained unchanged at 400.79 points.

**Vietnam:** VN-30 Index dropped 3.63% to close at 1,450.45 points on Friday, as the blue chip companies recorded losses. MSCI Vietnam fell 3.18% close at 1,018.41 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 1.12% to close at 11,076.55 points on Sunday, as losses in the Transport, Financial Services and Hotels & Tourism sectors pushed the shares lower. MSCI Tadawul 30 Index fell 1.06% to close at 1,498.83 points.

**India:** Nifty 50 decreased by 0.71% to close at 16,450.50 points on Friday, as losses in the Metals, Real Estate and Public Sector Undertakings sectors pushed the shares lower. MSCI India declined by 0.79% to close at 1,907.75 points.

### News

#### Nigeria:

Shell Loses Nigeria Oil License to State Company in Court Ruling  
Nigeria's External Reserves Hit \$37bn with \$3.5bn New SDRs  
NARTO, Dangote refinery to partner on product distribution

#### Kenya:

Kenya's Imports Jump to KSh992 Billion in the Six Months to June 2021  
Kenya's food imports bill surges to record Sh103bn  
CBK Accepts KSh 28.4 Billion at Auction, 118.24% Oversubscription

#### Abu Dhabi:

Adnoc Distribution included in FTSE Emerging Markets Index  
Mashreq and NPCI to offers payment solution  
Lulu Group eyes big box retail, to open UAE's first 'megamarket'

#### Saudi Arabia:

Saudi Arabia's 'solutions by stc' goes public; offers 20% share capital  
Saudi mining investment jumps 36 percent in Q1  
Kingdom Holding turns to profitability in H1-21

#### Egypt:

Egypt's central bank issues LE 11B in T-bills Sunday  
Egypt's agricultural exports hit 4.4 mn tons in 8 months  
Islamic banking in Egypt valued at EGP 390bn in June 2021

#### South Africa:

Standard Bank's 2025 Ambition targets return on investment of up to 20%  
Standard Bank lists two social bonds on the JSE to boost affordable home ownership  
ARB Holdings' healthy profit boosts share price

#### India:

Sebi keeps Adani Wilmar's Rs 4,500 crore IPO in abeyance  
Govt continues to borrow heavily, hits 46% FY22 target  
Coal India's capex up twofold to Rs 1,840 cr

#### Vietnam:

Hoa Phat Group contributes 276 mn USD to State budget in seven months  
State to manage competition for telecoms services  
Textile industry faces challenges in meeting export target

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,679.25	0.8%	0.8%	3.9%	52.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,690.79	-1.1%	-1.1%	-1.1%	-1.4%	EGP/USD	15.70	0.0%	-0.2%
India	16,450.50	-0.7%	0.0%	4.4%	17.7%	INR/USD	74.40	0.2%	1.8%
Kenya	2,015.77	0.5%	0.0%	2.1%	7.9%	KES/USD	109.55	0.0%	0.3%
Nigeria	1,633.23	-0.6%	0.0%	-0.4%	-0.4%	NGN/USD	411.50	0.0%	4.2%
Saudi Arabia	11,076.55	-1.1%	-1.1%	0.1%	27.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,800.02	-0.1%	0.0%	-4.9%	10.0%	ZAR/USD	15.31	1.0%	4.2%
Vietnam	1,450.45	-3.6%	0.0%	0.2%	35.5%	VND/USD	22,825.00	0.0%	-1.1%

## MSCI Emerging Markets

MSCI Frontier	651.97	-0.9%	0.0%	1.5%	14.1%	Brent Crude (\$)	65.18	-1.9%	25.8%
MSCI Frontier 100	1,467.60	-0.7%	0.0%	2.0%	16.7%	Gold (\$)	1,784.00	0.1%	-5.9%
MSCI Emerging	1,220.78	-0.9%	0.0%	-4.5%	-5.5%	Copper (\$)	9,037.00	1.6%	16.4%
MSCI World (USD)	3,080.02	0.5%	0.0%	0.4%	14.5%	Coffee (\$)	157.51	-0.9%	32.1%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
UACN	11.45	9.6%	57.9%	54.18	Cadbury	8.50	-5.0%	-5.6%	7.78
FCMB	3.09	2.0%	-7.2%	20.24	International Breweries	4.80	-4.0%	-19.3%	3.69
Wema	0.88	1.1%	27.5%	5.63	Lafarge Africa	22.70	-1.3%	7.8%	31.51
Sterling	1.53	0.7%	-25.0%	1.03	Access	9.00	-1.1%	6.5%	27.52
United Capital PLC	6.89	0.6%	65.2%	26.16	Transnational Corporation	0.97	-1.0%	7.8%	13.98
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	11.45	11.45	0.0%	54.18	UBN	5.25	4.65	12.9%	0.53
Total	199.20	199.20	0.0%	6.52	Transcorp Hotels	3.92	3.25	20.6%	0.00
Seplat Petroleum	759.70	759.70	0.0%	276.74	Cap	19.50	15.25	27.9%	0.68
P Z Cussons	6.00	6.00	0.0%	3.01	Cadbury	8.50	6.30	34.9%	7.78
Okomu Oil	110.00	110.00	0.0%	8.52	Sterling	1.53	1.13	35.4%	1.03

### 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	2.70	14.9%	145.5%	8.45	Commercial Bank Intl	0.63	-10.0%	-16.0%	0.00
Arkan Building Materials	1.52	14.3%	72.7%	85.01	National Bank of Umm Al Qaiwain	1.35	-10.0%	-32.5%	0.03
ZEE STORE PRJSC	15.54	7.6%	48.0%	11.92	Sudatel Telecom	0.35	-6.4%	-15.4%	0.00
PALMS SPORTS	13.40	6.9%	1.5%	9.20	RAK Co. for White Cement & Construction	0.93	-4.5%	9.5%	0.02
Abu Dhabi National for Building Materials	0.32	6.7%	23.6%	0.01	ESG EMIRATES STALLIONS GROUP	3.71	-3.6%	-10.8%	1.77
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	43.00	43.00	0.0%	5.15	Al Ain Ahlia Ins.	29.20	29.20	0.0%	0.00
Zee Stores PJSC	15.54	15.54	0.0%	12.58	Commercial Bank Intl	0.63	0.63	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
Invest Bank PSC	0.45	0.45	0.0%	0.00	National Bank of Umm Al Qaiwain	1.35	1.35	0.0%	0.03

## Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Cairo For Investment And Real Estate Development	12.26	4.0%	-14.0%	0.43	Fawry For Banking Technology And Electronic Payment	16.16	-3.4%	-38.2%	39.07
GB AUTO	3.98	1.0%	19.9%	13.18	Ibnsina Pharma	3.94	-3.0%	-22.6%	8.20
Misir Fertilizers Production Company - Mopco	75.56	0.1%	28.5%	0.23	Alexandria Mineral Oils Company	3.45	-2.5%	10.6%	8.50
					T M G Holding	6.84	-2.4%	4.1%	3.08
					Telecom Egypt	14.53	-2.0%	21.8%	5.26
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	14.53	14.53	0.0%	5.26	Commercial International Bank	44.89	44.89	0.0%	11.99
Sidi Kerir Petrochemicals	10.22	10.22	0.0%	9.61	GB AUTO	3.98	3.98	0.0%	13.18
Pioneers Holding	4.87	4.87	0.0%	6.32	Medinet Nasr Housing Palm Hills Development Company	3.00	3.00	0.0%	31.50
Oriental Weavers	8.29	8.29	0.0%	2.43		1.77	1.77	0.0%	1.36
MM Group For Industry And International Trade	7.39	7.39	0.0%	4.97	T M G Holding	6.84	6.84	0.0%	3.08

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2606.90	4.9%	8.8%	14881.925	Tata Steel	1367.70	-8.9%	112.5%	38618.12
Britannia Inds.	3874.95	4.1%	8.3%	6039.14	Jsw Steel	684.45	-7.2%	76.8%	9152.91
Asian Paints	3108.00	3.6%	12.4%	12093.26	Hindalco Industries	402.00	-5.8%	67.1%	9480.43
Nestle India Limited	19500.00	3.1%	6.0%	2755.70	UPL	723.95	-5.0%	55.2%	3133.06
Bajaj Finance	6637.00	1.4%	25.3%	14355.03	Tata Motors	281.60	-4.0%	53.2%	9324.04
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	19500.00	19641.10	-0.7%	2755.70	Hero Motocorp	2690.15	2681.20	0.3%	2196.56
HUL	2606.90	2630.00	-0.9%	14881.92	Maruti Suzuki India	6839.00	6270.15	9.1%	4512.43
Titan Company	1870.10	1892.30	-1.2%	2004.61	Dr Reddys Lab	4540.25	4135.00	9.8%	3778.24
Tata Consultancy Svs.	3551.60	3595.00	-1.2%	10078.56	Britannia Inds.	3874.95	3317.30	16.8%	6039.14
Bajaj Finance	6637.00	6732.70	-1.4%	14355.03	Reliance Industries	2140.10	1830.00	16.9%	9377.48

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	4.49	6.7%	-4.7%	6.88	WPP Scangroup Plc	4.03	-6.1%	-32.8%	3.31
Nairobi Securities Exchange Plc	9.78	3.4%	19.9%	0.05	Nation Media Group	24.95	-1.4%	61.5%	0.04
Stanbic Holdings	94.00	3.0%	10.6%	0.01	Absa Bank Kenya	10.15	-1.0%	5.1%	0.90
Total Kenya Ltd	25.20	2.9%	5.0%	0.24	Kenya Power & Lighting Limited	1.39	-0.7%	-18.7%	0.22
British American Tobacco Kenya Ltd	469.00	2.0%	29.9%	0.09	Bamburi Cement Limited	38.75	-0.6%	2.4%	2.44
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%	0.01	WPP Scangroup Plc	4.03	3.99	1.0%	3.31
Safaricom Plc	44.45	45.25	-1.8%	224.45	Standard Chartered Bank Kenya Ltd	134.75	127.00	6.1%	3.52
Nairobi Securities Exchange Plc	9.78	10.00	-2.2%	0.05	Centum Investment Company Plc	15.75	14.05	12.1%	0.43
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	2.08	Diamond Trust Bank Limited	65.00	57.50	13.0%	2.36
NCBA Group Plc	27.10	27.85	-2.7%	0.19	Kengen Limited	4.49	3.90	15.1%	6.88

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tourism Enterprise Co.	59.50	4.6%	8.2%	21.69	Amana Cooperative Insurance Co.	54.30	-4.7%	46.2%	12.14
Etihad Atheeb Telecommunication Co.	30.30	4.5%	174.0%	122.19	Bawan Co.	38.95	-4.5%	56.8%	16.88
Jabal Omar Development Co.	33.90	4.2%	16.5%	85.32	Ash-Sharqiyah Development Co.	95.50	-4.4%	0.8%	29.05
Saudi Industrial Export Co.	112.00	3.5%	0.4%	27.70	Batic Investments and Logistics Co.	36.85	-4.3%	5.6%	17.89
Al Hassan Ghazi Ibrahim Shaker Co.	29.50	2.8%	83.0%	108.53	Banque Saudi Fransi	38.85	-4.1%	22.9%	8.19
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	65.90	65.90	0.0%	20.26	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	36.00	36.00	0.0%	46.47	BinDawood Holding Co.	107.60	105.60	1.9%	11.98
United Electronics Co.	131.60	131.60	0.0%	8.28	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Cooperative Assurance Co.	30.75	30.75	0.0%	17.92	Savola Group	38.45	36.60	5.1%	23.99
The Company for Cooperative Insurance	95.00	95.00	0.0%	18.80	Saudi Airlines Catering Co.	79.00	70.50	12.1%	26.69

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields	13771.00	2.6%	0.1%	46250.59	Impala Platinum	20660.00	-6.9%	2.3%	79949.24
Brit.Amer.Tobacco (JSE)	56631.00	2.5%	3.8%	34062.19	Mr Price Group	21935.00	-6.5%	28.5%	36883.31
Nepi Rockcastle	10472.00	2.1%	12.0%	11292.74	Northam Platinum	19007.00	-5.8%	-9.3%	42234.50
Shoprite Limited	16970.00	1.6%	21.2%	20992.55	Anglo American Platinum	151838.00	-3.7%	11.7%	28974.79
BHP Group (JSE)	45446.00	1.5%	16.8%	53317.34	Sibanye Stillwater	5628.00	-3.4%	-6.2%	98930.67
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)
Investec Plc	5903.00	5910.00	-0.1%	8227.68	Naspers Ltd	240058.00	234080.00	2.6%	482893.23
Mondi (JSE)	42619.00	42713.00	-0.2%	12873.54	Prosus (JSE)	122697.00	114101.00	7.5%	264991.78
Clicks Group	29765.00	29911.00	-0.5%	21645.85	Anglogold Ashanti	24329.00	22600.00	7.7%	26499.76
Shoprite Limited	16970.00	17183.00	-1.2%	20992.55	Brit.Amer.Tobacco	56631.00	50757.00	11.6%	34062.19
Firstrand Ltd	5900.00	6010.00	-1.8%	27755.63	Gold Fields	13771.00	12193.00	12.9%	46250.59

## 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	36350.00	-6.3%	21.4%	465.681.67
					Vingroup JSC	97700.00	-6.1%	-0.2%	489554.72
					Sai Gon Thuong Tin Commercial	28300.00	-5.5%	-12.9%	1,221.001.13
					Khang Dien House Trading & Investment	39400.00	-5.2%	47.9%	165.708.19
					Mobile World Inv. Corp	164000.00	-4.9%	37.9%	341.325.36
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	62500.00	62500.00	0.0%	1001058.39	Khang Dien House Trade & Investment	39400.00	39400.00	0.0%	165.708.19
Vietjet Aviation	119800.00	119800.00	0.0%	194.611.19	Military Commercial Bank	29900.00	29900.00	0.0%	962.106.26
Vingroup JSC	97700.00	97700.00	0.0%	489554.72	Vietnam National Petroleum Group	49600.00	49600.00	0.0%	100.149.46
Vinhomes	108100.00	108100.00	0.0%	2236846.89	PetroVietnam Power Corp	10900.00	10900.00	0.0%	169695.86
Techcombank	50500.00	50500.00	0.0%	1619822.65	Saigon Beer Alcohol Beverage	143000.00	143000.00	0.0%	50347.50

\*No gainers on 20/8

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