

# Daily Market Report

## 24 August 2021

### JSE

JSE All-Share Index rose 1.24% to close at 66,829.19 points on Monday, as all the sectors recorded gains.

### BRVM

BRVM Composite Index closed at 175.65 points, down by 0.11% on Monday with Sicom Côte d'Ivoire and Solibra Côte d'Ivoire being the top losers.

### NSE

NSE All-Share decreased by 0.12% to close at 39,434.69 points on Monday, as the Consumer Goods, Oil & Gas, Banking and Industrial sectors recorded losses.

### EGX

EGX 30 Index rose 1.81% and closed at 10,884.29 points on Monday, as the market gained LE 10.33 billion of market cap, amid Egyptian buying.

### ESG

Casablanca ESG 10 Index closed at 955.36 points on Monday, as it rose 1.10%.

### Capital Markets

<b>JSE</b> Johannesburg Stock Exchange	▲ 1.24%
<b>BRVM</b> Bourse Régionale des Valeurs Mobilières	▼ 0.11%
<b>NSE</b> Nigerian Stock Exchange	▼ 0.12%
<b>EGX</b> Egyptian Stock Exchange	▲ 1.81%
<b>ESG</b> Casablanca Stock Exchange	▲ 1.10%

### African Markets

**Nigeria:** NSE 30 Index decreased by 0.21% and closed at 1,629.79 points on Monday. Lafarge Africa and UBN were the top losers.

**Egypt:** EGX 30 Index rose 1.81% and closed at 10,884.29 points on Monday, as the market gained LE 10.33 billion of market cap, amid Egyptian buying.

**Kenya:** NSE 20 Index increased by 0.23% and closed at 2,020.37 points on Monday. Total Kenya and Kengen were the top gainers.

**South Africa:** JSE Top 40 Index increased by 1.27% to close at 60,562.05 points on Monday, as all the sectors recorded gains.

### Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.16
<b>INTERBANK RATES</b>	
OBB	17.50 ▼
Overnight	17.50 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX General increased marginally by 0.06% to close at 7,683.98 points on Monday, as Aldar Properties and Alpha Dhabi Holding recorded gains. MSCI UAE Index rose 0.94% to close at 404.55 points.

**Vietnam:** VN-30 Index dropped 2.65% to close at 1,412.00 points on Monday, as the blue chip companies recorded losses. MSCI Vietnam fell 2.13% close at 996.72 points.

**Saudi Arabia:** Tadawul All Share Index decreased by 0.12% to close at 11,062.99 points on Monday, as losses in the Telecoms & IT, Energy & Utilities and Building & Construction sectors led shares lower. MSCI Tadawul 30 Index fell 0.17% to close at 1,496.30 points.

**India:** Nifty 50 increased by 0.28% to close at 16,496.45 points on Monday, as gains in the Technology, IT and Oil & Gas sectors propelled shares higher. MSCI India was up by 0.19% to close at 1,911.32 points.

### News

#### Nigeria:

Nigeria entitled to \$3.35bn in new IMF rights allocation  
United Capital Increases Issuance of CPs to N50bn  
SoftBank leads \$400m funding round for Nigerian fintech

#### Kenya:

StanChart profit jumps 50pc on lower expenses  
State eyes market with Sh75 billion infrastructure bond  
Overseas Remittances Reach KSh230 bn in 7 Months

#### Abu Dhabi:

Adnoc signs deals worth Dhs3.67 billion for project engineering services  
Abu Dhabi's property market defies challenges of COVID-19 pandemic  
Masdar City Free Zone launches new licence options for businesses

#### Saudi Arabia:

Saudi SMEs get 3-year exemption from commerce fees  
Tadawul halts trading on Al Sagr Cooperative Insurance, MESC  
MAF Revenue falls in H1 as pandemic bites

#### Egypt:

Total investments targeted for petroleum sector in 21/22 plan hit LE 65.3B  
Production index for transformative, extractive industries hikes 14.49% in June  
Egypt's central bank issues LE 10.5B in T-bonds Monday

#### South Africa:

IMF provides R65bn emergency funding for SA to tackle Covid-19  
Shoprite acquires Massmart's non-core assets to bolster its low-price position  
ARM expects bumper annual earnings ahead

#### India:

Finance minister unveils Rs 6L crore national asset monetisation plan  
Hindalco has \$2.5-3 billion capex plans for next 5 years: KM Birla  
Foreign direct investments rise to \$12.1 bln in May: Piyush Goyal

#### Vietnam:

Vietnamese coffee industry to go global  
Delivery businesses resume in HCM City, but stymied by Covid restrictions  
Vinh Phuc supports industrial production facilities improve productivity, products' quality

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,683.98	0.1%	0.8%	3.9%	52.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,884.29	1.8%	0.7%	0.7%	0.4%	EGP/USD	15.70	0.0%	-0.2%
India	16,496.45	0.3%	0.3%	4.7%	18.0%	INR/USD	74.21	-0.2%	1.6%
Kenya	2,020.37	0.2%	0.2%	2.3%	8.1%	KES/USD	109.60	0.0%	0.4%
Nigeria	1,629.79	-0.2%	-0.2%	-0.6%	-0.6%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	11,062.99	-0.1%	-1.2%	0.0%	27.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,562.05	1.3%	1.3%	-3.6%	11.4%	ZAR/USD	15.15	-1.1%	3.1%
Vietnam	1,412.00	-2.7%	-2.7%	-2.4%	31.9%	VND/USD	22,827.50	0.0%	-1.1%

## MSCI Emerging Markets

MSCI Frontier	650.84	-0.2%	-0.2%	1.4%	13.9%	Brent Crude (\$)	68.75	5.5%	32.7%
MSCI Frontier 100	1,467.88	0.0%	0.0%	2.0%	16.7%	Gold (\$)	1,806.30	1.3%	-4.7%
MSCI Emerging	1,237.53	1.4%	1.4%	-3.2%	-4.2%	Copper (\$)	9,273.50	2.6%	19.4%
MSCI World (USD)	3,112.57	1.1%	1.1%	1.4%	15.7%	Coffee (\$)	158.37	0.5%	32.8%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	4.30	9.7%	19.4%	0.78	Lafarge Africa	21.50	-5.3%	2.1%	104.92
Sterling	1.55	1.3%	-24.0%	1.22	P Z Cussons	5.75	-4.2%	8.5%	3.48
Wema	0.89	1.1%	29.0%	8.97	UBN	5.05	-3.8%	-5.6%	6.13
Access	9.10	1.1%	7.7%	27.80	FCMB	3.02	-2.3%	-9.3%	1.22
United Capital PLC	6.96	1.0%	66.9%	11.64	International Breweries	4.70	-2.1%	-21.0%	11.13
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%	48.64	UBN	5.05	4.65	8.6%	6.13
Transcorp Hotels	4.30	4.30	0.0%	0.78	Cap	19.50	15.25	27.9%	0.56
Total	199.20	199.20	0.0%	1.36	Transcorp Hotels	4.30	3.25	32.3%	0.78
Seplat Petroleum	759.70	759.70	0.0%	1.37	Cadbury	8.50	6.30	34.9%	0.52
Okomu Oil	110.00	110.00	0.0%	0.33	Ecobank	5.30	3.90	35.9%	0.34

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Esg Emirates Stallions Group	4.26	14.8%	2.4%	1.84	Sharjah Cement	0.66	-5.7%	-13.2%	0.03
National Bank of Umm Al Qaiwain	1.55	14.8%	-22.5%	0.02	Sharjah Islamic Bank	1.75	-2.2%	32.6%	1.56
Al Qudra Holding	3.10	14.8%	181.8%	7.83	Agthia Group	5.98	-1.0%	40.7%	2.12
Arkan Building Materials	1.73	13.8%	96.6%	92.39	RAK Properties	0.71	-0.8%	48.1%	21.28
Sharjah Group Co.	0.90	12.5%	5.9%	13.89	Emirates Telecom	24.30	-0.8%	43.8%	32.66
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%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Commercial Bank Intl	0.63	0.63	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	National Bank of Fujairah	4.98	4.98	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	2.30	7.5%	62.0%	65.04	Tenth Of Ramadan Pharma. Ind & Diagnostic-Rameda	2.83	-2.4%	-25.5%	13.89
Sidi Kerir Petrochemicals	10.61	3.8%	14.0%	24.56	Orascom Development	5.05	-1.2%	3.1%	19.34
Ezz Steel	14.45	3.4%	34.7%	21.01	GB AUTO	3.94	-1.0%	18.7%	4.21
Commercial International Bank(Egypt)	46.40	3.4%	-21.6%	nse	Medinet Nasr Housing	2.97	-1.0%	-22.3%	32.78
Speed Medical	2.27	3.2%	39.3%	20.93	Cairo For Investment And Real Estate Dev.	12.15	-0.9%	-14.7%	0.15
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	14.41	14.41	0.0%	23.36	Commercial International Bank	46.40	46.40	0.0%	79.91
Sidi Kerir Petrochemicals	10.61	10.61	0.0%	24.56	GB AUTO	3.94	3.94	0.0%	4.21
Pioneers Holding	4.92	4.92	0.0%	10.99	Medinet Nasr Housing	2.97	2.97	0.0%	32.78
Oriental Weavers	8.31	8.31	0.0%	4.52	Palm Hills Development	1.78	1.78	0.0%	2.53
MM Group For Industry AndInternational Trade	7.55	7.55	0.0%	6.04	T M G Holding	6.92	6.92	0.0%	1.57

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Hcl Technologies	1165.00	4.3%	23.1%	10876.270	Grasim Industries	1438.00	-3.1%	55.0%	1697.06
Tata Consultancy Svs.	3635.00	2.1%	27.0%	13617.49	Adani Ports And Sez.	668.10	-2.8%	38.1%	4489.45
Nestle India Limited	19967.00	2.0%	8.6%	2949.01	Mahindra & Mahindra	764.95	-2.6%	6.2%	1952.12
Bajaj Finserv	15260.30	1.9%	71.3%	4987.41	Eicher Motors	2541.05	-2.3%	0.4%	3254.39
ONGC	111.95	1.6%	20.3%	1861.68	Bajaj Auto	3667.00	-2.3%	6.5%	1688.37
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Nestle India Limited	19967.00	20095.00	-0.6%	2949.01	Hero Motocorp	2674.75	2656.50	0.7%	2030.81
Infosys	1739.60	1755.50	-0.9%	10779.16	Maruti Suzuki India	6835.00	6270.15	9.0%	3679.34
Tata Consultancy Svs.	3635.00	3673.00	-1.0%	13617.49	Dr Reddys Lab	4510.00	4135.00	9.1%	2577.14
Bajaj Finserv	15260.30	15420.00	-1.0%	4987.41	Britannia Inds.	3860.00	3317.30	16.4%	2515.50
Hcl Technologies	1165.00	1178.20	-1.1%	10876.27	Reliance Industries	2161.15	1830.00	18.1%	9809.43

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	26.00	3.2%	8.3%	1.04	Nairobi Securities Exchange Plc	9.64	-1.4%	18.1%	0.02
Kengen Limited	4.58	2.0%	-2.8%	0.79	WPP Scangroup Plc	3.99	-1.0%	-33.5%	0.98
Absa Bank Kenya	10.30	1.5%	6.6%	27.67	NCBA Group Plc	26.95	-0.6%	0.7%	3.48
Centum Investment Company Plc	15.95	1.3%	-0.6%	0.80	Kenya Reinsurance Corporation Ltd	2.46	-0.4%	6.0%	0.39
Safaricom Plc	44.95	1.1%	31.2%	346.81					
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)
Safaricom Plc	44.95	45.25	-0.7%	346.81	WPP Scangroup Plc	3.99	3.98	0.3%	0.98
Stanbic Holdings	94.25	95.00	-0.8%	0.15	Standard Chartered Bank Kenya Ltd	136.25	127.00	7.3%	4.46
Equity Group Holdings Plc	53.00	54.25	-2.3%	131.01	Diamond Trust Bank Limited	65.00	57.50	13.0%	0.02
The Cooperative Bank of Kenya Ltd	13.70	14.05	-2.5%	51.88	Centum Investment Company Plc	15.95	14.05	13.5%	0.80
NCBA Group Plc	26.95	27.85	-3.2%	3.48	Kengen Limited	4.58	3.90	17.4%	0.79

## 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.	62.90	5.7%	14.4%	85.75	Fitaihi Holding Group	31.60	-3.4%	77.7%	44.45
Zamil Industrial Investment	37.85	5.1%	82.3%	137.07	Qassim Cement	83.70	-3.4%	3.3%	10.78
Tanmiah Food Co.	111.00	4.7%	65.7%	190.99	Etihad Atheeb Telecommunication	29.30	-3.3%	164.9%	27.88
Bawan Co.	40.20	3.2%	61.8%	21.36	Saudi Advanced Industries Co.	49.70	-2.9%	163.0%	88.92
Saudi Ceramic Co.	65.20	3.2%	81.3%	34.29	Saudi Arabian Mining Co.	67.00	-2.8%	65.4%	45.97
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	66.20	66.20	0.0%	49.77	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	37.85	37.85	0.0%	137.07	BinDawood Holding Co.	107.20	105.60	1.5%	7.48
United International Transportation Co.	48.50	48.50	0.0%	42.64	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	132.00	132.00	0.0%	24.36	Savola Group	38.50	36.60	5.2%	20.90
United Cooperative Assurance Co.	30.70	30.70	0.0%	13.62	Saudi Airlines Catering Co.	78.70	70.50	11.6%	22.81

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Northam Platinum	20505.00	7.9%	-2.1%	24145.77	Naspers Ltd	229087.00	-4.6%	-24.1%	548777.91
Impala Platinum	22215.00	7.5%	10.0%	78207.75	Clicks Group	29350.00	-1.4%	16.2%	23989.57
Sasol Limited	20930.00	6.7%	56.3%	34545.63	Prosus (JSE)	121000.00	-1.4%	-24.7%	363155.61
Anglo American Platinum	161652.00	6.5%	18.9%	29686.74	Multichoice Group	11477.00	-1.1%	-14.4%	9846.30
Sibanye Stillwater	5930.00	5.4%	-1.2%	60406.76	Reinet Investments	28433.00	-0.4%	3.2%	13535.84
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	6022.00	6022.00	0.0%	6755.93	Naspers Ltd	229087.00	229087.00	0.0%	548777.91
Shoprite Limited	17723.00	17737.00	-0.1%	22994.94	Prosus	121000.00	114101.00	6.0%	363155.61
Investec Ltd (JSE)	6064.00	6117.00	-0.9%	8674.95	Anglogold Ashanti	24483.00	22600.00	8.3%	26423.20
Firstrand Ltd	5990.00	6048.00	-1.0%	40219.90	Brit.Amer.Tobacco	56406.00	50757.00	11.1%	17284.55
Capitec Bank	185860.00	187890.00	-1.1%	52583.14	Gold Fields	13839.00	12193.00	13.5%	24623.98

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Saigon Securities Inc	63400.00	1.4%	202.6%	904913.16	Vietnam Rubber Group JSC	34200.00	-5.9%	14.2%	260051.63
No Va Land Invest	104900.00	1.2%	118.1%	357652.00	Masan Group Corp	127000.00	-5.1%	44.1%	223513.37
Vietjet Aviation	120300.00	0.4%	34.4%	187449.17	Asia Commercial JS Bank	32000.00	-4.8%	42.3%	509.548.50
					Sai Gon Thuong Tin Commercial	27000.00	-4.6%	-16.9%	830138.73
					Military Commercial Bank	28600.00	-4.4%	69.4%	640001.02
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	60600.00	60600.00	0.0%	562634.10	Hoa Phat Group JSC	47500.00	47500.00	0.0%	1581456.83
Vietjet Aviation	120300.00	120300.00	0.0%	187449.17	Khang Dien House Trading & Investment	38000.00	38000.00	0.0%	161922.42
Vingroup JSC	96200.00	96200.00	0.0%	208668.41	Military Commercial Bank	28600.00	28600.00	0.0%	640001.02
Vinhomes	107200.00	107200.00	0.0%	1728664.13	Vietnam National Petroleum Group	48500.00	48500.00	0.0%	88137.99
Techcombank	48750.00	48750.00	0.0%	1286597.60	PetroVietnam Power Corp	10550.00	10550.00	0.0%	92425.85

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