

Daily Market Report

25 August 2021

JSE

JSE All-Share Index increased by 0.93% to close at 67,451.56 points on Tuesday, as all the sectors recorded gains.

BRVM

BRVM Composite Index closed at 176.52 points, up by 0.50% on Tuesday with Sucrivoire Côte d'Ivoire and Sogb Côte d'Ivoire being the top gainers.

NSE

NSE All-Share increased marginally by 0.07% to close at 39,460.68 points on Tuesday, as the Consumer Goods, Insurance, Banking and Industrial sectors recorded gains.

EGX

EGX 30 Index increased 0.61% and closed at 10,950.24 points on Tuesday, as the market gained LE 1.63 billion of market cap, amid Arab buying.

ESG

Casablanca ESG 10 Index closed at 954.11 points on Tuesday, as it was down by 0.13%.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.93%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.50%
NSE Nigerian Stock Exchange	▲ 0.07%
EGX Egyptian Stock Exchange	▲ 0.61%
ESG Casablanca Stock Exchange	▼ 0.13%

African Markets

Nigeria: NSE 30 Index increased marginally by 0.08% and closed at 1,631.11 points on Tuesday. Ecobank and Lafarge Africa were the top gainers.

Egypt: EGX 30 Index increased 0.61% and closed at 10,950.24 points on Tuesday, as the market gained LE 1.63 billion of market cap, amid Arab buying.

Kenya: NSE 20 Index increased by 0.52% and closed at 2,030.87 points on Tuesday. Kengen and Diamond Trust Bank were the top gainers.

South Africa: JSE Top 40 Index rose 1.02% to close at 61,180.29 points on Tuesday, as all the sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.19
INTERBANK RATES	
OBB	15.50 ▼
Overnight	15.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General inched down 0.03% to close at 7,681.53 points on Tuesday, as Arkan Building Materials Company and Alpha Dhabi Holding recorded losses. MSCI UAE Index increased by 0.21% to close at 405.39 points.

Vietnam: VN-30 Index increased by 0.44% to close at 1,418.26 points on Tuesday, as the blue chip companies recorded gains. MSCI Vietnam increased by 0.25% close at 999.20 points.

Saudi Arabia: Tadawul All Share Index increased by 0.71% to close at 11,141.03 points on Tuesday, as gains in the Energy & Utilities, Agriculture & Food and Telecoms & IT sectors pushed the shares higher. MSCI Tadawul 30 Index rose 0.75% to close at 1,507.55 points.

India: Nifty 50 increased by 0.78% to close at 16,624.60 points on Tuesday, as gains in the Metals, Oil & Gas and Public Sector Undertakings sectors pushed the shares higher. MSCI India increased by 0.69% to close at 1,924.59 points.

News

Nigeria:

FMDQ Exchange Admits N19.6bn FSDH Merchant Bank's CPs
2022 Budget: Health, defence, transport, works get highest capital allocations
PIA: Govt can sell NNPC shares to individuals, says Kyari

Kenya:

Kenya's External Trade Hits KSh1.4 Trillion in H1 2021
UAE-based firm targets region after acquiring Delta petrol stations
Payroll taxes surpass target despite Covid disruptions

Abu Dhabi:

ADNOC L&S acquires six line boats for services in Abu Dhabi petroleum ports
Tech, energy, tourism in focus as \$24bn deals boost Arab-China ties
IHC eyes deals worth 'a few billion dollars'

Saudi Arabia:

Saudi Arabia's June oil exports rise 123% to over \$16bn
Saudi non-oil exports up by 40.5% year-on-year in June to \$6.2bn
Saudi information technology sector will hit \$27 billion by 2025

Egypt:

Egypt prepares to issue its first sovereign sukuk in H2 of 2021-2022
Egypt's wealth fund TSFE aims to raise \$2.5bn for development projects
Mubasher activates trading platform for non-resident foreigners in 70 fin. markets

South Africa:

SA's unemployment rate hits new record high in second quarter
Prosus announces R76 billion share buy-back programme
Shoprite plans to exit from its Uganda and Madagascar markets

India:

Govt considers allowing foreign direct investment in Life Insurance Corporation
Taj Hotels to raise upto Rs 3,000 crore from rights issue
ReNew Power lists in US via SPAC, mcap hits \$4.5bn

Vietnam:

Vietnam forecast to grow by 4.8 percent in 2021: World Bank
Tien Giang's exports surge 19.8 percent during January-July
Banks continually cut lending rates to aid pandemic affected customers

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,681.53	-0.03%	0.8%	3.9%	52.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,950.24	0.6%	1.3%	1.3%	1.0%	EGP/USD	15.70	0.0%	-0.2%
India	16,624.60	0.8%	1.1%	5.5%	18.9%	INR/USD	74.19	0.0%	1.5%
Kenya	2,030.87	0.5%	0.7%	2.9%	8.7%	KES/USD	109.65	0.0%	0.4%
Nigeria	1,631.11	0.1%	-0.1%	-0.5%	-0.5%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	11,141.03	0.7%	-0.5%	0.7%	28.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,180.29	1.0%	2.3%	-2.7%	12.5%	ZAR/USD	14.98	-1.1%	2.0%
Vietnam	1,418.26	0.4%	-2.2%	-2.0%	32.5%	VND/USD	22,821.00	0.0%	-1.1%

MSCI Emerging Markets

MSCI Frontier	653.52	0.4%	0.2%	1.8%	14.3%	Brent Crude (\$)	71.05	3.3%	37.2%
MSCI Frontier 100	1,472.58	0.3%	0.3%	2.3%	17.1%	Gold (\$)	1,808.50	0.1%	-4.6%
MSCI Emerging	1,270.01	2.6%	4.0%	-0.6%	-1.6%	Copper (\$)	9,376.00	1.1%	20.7%
MSCI World (USD)	3,122.00	0.3%	1.4%	1.7%	16.1%	Coffee (\$)	160.02	1.0%	34.2%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	5.45	2.8%	-9.2%	4.25	UACN	10.70	-6.6%	47.6%	17.32
Lafarge Africa	22.00	2.3%	4.5%	56.83	Guinness	31.00	-2.5%	63.2%	25.24
Dangote Sugar	18.00	0.8%	2.3%	14.49	Axamansard	0.86	-2.3%	-18.1%	2.35
Zenith	24.50	0.8%	-1.2%	167.56	Fidelity	2.36	-1.7%	-6.3%	12.26
FBNH	7.45	0.7%	4.2%	80.63	UBA	7.45	-1.3%	-13.9%	116.94
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	10.70	10.70	0.0%	17.32	UBN	5.05	4.65	8.6%	0.19
Transcorp Hotels	4.30	4.30	0.0%	0.01	Cap	19.50	15.25	27.9%	0.65
Total	199.20	199.20	0.0%	2.40	Transcorp Hotels	4.30	3.25	32.3%	0.01
Seplat Petroleum	759.70	759.70	0.0%	289.65	Cadbury	8.50	6.30	34.9%	24.88
Okomu Oil	110.00	110.00	0.0%	6.54	Sterling	1.55	1.13	37.2%	6.27

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	3.56	14.8%	223.6%	10.97	Arkan Building Materials	1.56	-9.8%	77.3%	51.97
Esg Emirates Stallions Group	4.89	14.8%	17.5%	1.48	Umm Al Qaiwain General Investment Co	0.86	-6.5%	-4.4%	0.01
Manazel PJSC	0.43	8.7%	21.4%	34.20	Zee Store	14.98	-5.6%	42.7%	23.75
PALMS SPORTS	15.18	6.9%	15.0%	16.74	Abu Dhabi National Energy	1.31	-2.2%	-9.0%	12.10
Sudatel Telecom	0.38	5.5%	-8.0%	0.04	Bank of Sharjah	0.53	-1.9%	-15.9%	2.59
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 EE)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn EE)
Egyptian for Tourism Resorts	2.53	10.0%	78.2%	83.06	Orascom Development Egypt	4.95	-2.0%	1.0%	11.62
Ibnsina Pharma	4.16	5.1%	-18.3%	22.59	Alexandria Mineral Oils Company	3.38	-1.7%	8.3%	21.32
Pioneers Holding	5.12	4.1%	27.4%	44.37	Medinet Nasr Housing	2.92	-1.7%	-23.6%	45.57
Heliopolis Housing	4.96	2.3%	-18.7%	nse	Sidi Kerir Petrochemicals	10.45	-1.5%	12.2%	22.79
Speed Medical	2.32	2.2%	42.3%	45.50	ELSWEDY ELECTRIC	8.49	-1.3%	-13.5%	24.97
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn EE)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn EE)
Telecom Egypt	14.52	14.52	0.0%	7.55	Commercial International Bank	46.75	46.75	0.0%	60.51
Sidi Kerir Petrochemicals	10.45	10.45	0.0%	22.79	GB AUTO	3.94	3.94	0.0%	2.47
Pioneers Holding	5.12	5.12	0.0%	44.37	Medinet Nasr Housing	2.92	2.92	0.0%	45.57
Oriental Weavers	8.40	8.40	0.0%	32.81	Palm Hills Dev. Company	1.80	1.80	0.0%	5.45
MM Group For Industry AndInternational Trade	7.57	7.57	0.0%	5.82	T M G Holding	6.90	6.90	0.0%	1.39

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bajaj Finserv	16460.00	7.8%	84.8%	20581.103	Britannia Inds.	3812.00	-1.4%	6.6%	1676.53
Hindalco Industries	422.50	3.9%	75.6%	6311.68	Nestle India Limited	19740.00	-1.4%	7.3%	1645.71
Adani Ports And Sez.	693.65	3.8%	43.4%	5216.01	Asian Paints	3045.10	-1.1%	10.2%	2326.51
Tata Steel	1407.15	3.6%	118.6%	24646.74	HDFC	2694.00	-1.0%	5.3%	8043.01
Bajaj Finance	6980.00	3.4%	31.8%	18163.24	Infosys	1721.50	-1.0%	37.1%	13151.94
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tech Mahindra	1461.10	1467.00	-0.4%	7781.72	Hero Motocorp	2675.00	2652.00	0.9%	1517.63
Bajaj Finserv	16460.00	16584.80	-0.8%	20581.10	Maruti Suzuki India	6795.00	6270.15	8.4%	4399.26
Bajaj Finance	6980.00	7049.00	-1.0%	18163.24	Dr Reddys Lab	4584.00	4135.00	10.9%	2794.17
Wipro	632.70	639.20	-1.0%	2827.57	Britannia Inds.	3812.00	3317.30	14.9%	1676.53
Titan Company	1873.00	1895.00	-1.2%	1872.30	Reliance Industries	2178.00	1830.00	19.0%	11905.11

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
KenGen Limited	4.74	3.5%	0.6%	2.48	Total Kenya Ltd	25.15	-3.3%	4.8%	0.64
Diamond Trust Bank Limited	66.75	2.7%	-11.0%	2.67	Kenya Power & Lighting Limited	1.37	-2.1%	-19.9%	0.47
Absa Bank Kenya	10.55	2.4%	9.2%	3.17	Nairobi Securities Exchange Plc	9.44	-2.1%	15.7%	0.11
Standard Chartered Bank Kenya Ltd	139.00	2.0%	-3.6%	3.92	East African Breweries Limited	178.50	-0.8%	15.7%	46.57
Centum Investment Company Plc	16.15	1.3%	0.6%	0.23	British American Tobacco Kenya Ltd	466.00	-0.6%	29.1%	2.38
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	95.00	95.00	0.0%	0.06	WPP Scangroup Plc	3.97	3.94	0.8%	0.54
Safaricom Plc	44.95	45.25	-0.7%	126.01	Standard Chartered Bank Kenya Ltd	139.00	127.00	9.4%	3.92
The Cooperative Bank of Kenya Ltd	13.80	14.05	-1.8%	2.53	Centum Investment Company Plc	16.15	14.05	14.9%	0.23
Equity Group Holdings Plc	53.00	54.25	-2.3%	90.90	Diamond Trust Bank Limited	66.75	57.50	16.1%	2.67
Absa Bank Kenya	10.55	10.80	-2.3%	3.17	Kenya Power & Lighting Limited	1.37	1.16	18.1%	0.47

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Cable Co.	27.15	4.8%	-8.7%	45.13	Arabian Pipes Co.	17.48	-3.6%	-2.6%	34.47
Rabigh Refining and Petrochemical Co.	24.04	4.3%	74.0%	61.29	Al Sagr Coop Insurance Co.	14.78	-2.1%	-5.1%	20.14
Saudi Arabian Mining Co.	69.70	4.0%	72.1%	93.68	Al Rajhi REIT Fund	12.16	-1.9%	25.4%	7.00
Saudi Real Estate Co.	24.80	3.9%	64.0%	34.80	Al Hassan Ghazi Ibrahim Shaker Co.	28.45	-1.7%	76.5%	39.59
Saudi Company for Hardware	63.70	3.2%	9.5%	26.38	Middle East Paper	35.35	-1.7%	83.0%	99.85
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	65.80	65.80	0.0%	20.93	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	37.70	37.70	0.0%	61.58	BinDawood Holding Co.	108.40	105.60	2.7%	9.14
United International Transportation Co.	49.10	49.10	0.0%	23.75	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	130.00	130.00	0.0%	20.66	Savola Group	39.20	36.60	7.1%	14.43
United Cooperative Assurance Co.	30.35	30.35	0.0%	4.19	Saudi Airlines Catering Co.	80.10	70.50	13.6%	37.95

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Limited	22348.00	6.8%	66.9%	75847.41	Brit.Amer.Tobacco (JSE)	55163.00	-2.2%	1.1%	21663.01
Naspers Ltd	237300.00	3.6%	-21.4%	607899.00	Reinet Investments (JSE) SCA	28183.00	-0.9%	2.3%	7452.52
Standard Bank Group	14452.00	3.1%	13.7%	75168.26	Northam Platinum	20334.00	-0.8%	-3.0%	23288.86
Prosus (JSE)	124670.00	3.0%	-22.4%	304750.08	Multichoice Group	11400.00	-0.7%	-14.9%	19025.82
Shoprite Limited	18184.00	2.6%	29.9%	40389.66	Firststrand Ltd	5960.00	-0.5%	16.8%	87117.19
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	188968.00	189781.00	-0.4%	59204.05	Naspers Ltd	237300.00	229087.00	3.6%	607899.00
Standard Bank Group	14452.00	14535.00	-0.6%	75168.26	Brit.Amer.Tobacco (JSE)	55163.00	50757.00	8.7%	21663.01
ABSA Group	15384.00	15488.00	-0.7%	33914.94	Prosus (JSE)	124670.00	114101.00	9.3%	304750.08
Investec Ltd (JSE)	6061.00	6119.00	-0.9%	11009.94	Anglogold Ashanti	24729.00	22600.00	9.4%	29982.21
Aspen Phmc.R.Hdg.	18816.00	19000.00	-1.0%	20380.74	Reinet Investments (JSE) SCA	28183.00	24721.00	14.0%	7452.52

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Phat Dat Real Estate Development Corp	86000.00	4.6%	105.2%	357.007.67	Saigon Securities Inc	61200.00	-3.5%	192.1%	1429356.78
Vietjet Aviation	122800.00	2.1%	37.2%	182.720.58	Vingroup JSC	95400.00	-0.8%	-2.6%	135917.37
Saigon Beer Alcohol Beverage Corp.	142400.00	1.7%	-27.0%	27416.57	Vietnam Rubber Group JSC	34000.00	-0.6%	13.5%	220608.63
Mobile World Inv. Corp	160500.00	1.5%	35.0%	169197.32	Vietcombank	97000.00	-0.3%	386.2%	103.767.22
Masan Group Corp	128500.00	1.2%	45.8%	166497.06	Phu Nhuan Jewelry	88300.00	-0.2%	10.1%	42544.77
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)
Phat Dat Real Estate Development Corp	61200.00	63600.00	-3.8%	1425794.76	Tien Phong Commercial Joint Stock Bank	86300.00	84000.00	2.7%	205022.91
Vietnam JSC Bank	91900.00	97364.24	-5.6%	283189.85	Vincom Retail	18200.00	17558.82	3.7%	103201.28
Mobile World Inv. Corp	57900.00	63500.00	-8.8%	73573.53	Vietcombank	26150.00	25050.00	4.4%	110831.55
Vietnam Rubber Group JSC	128500.00	141500.00	-9.2%	167332.70	Asia Commercial JS Bank	39400.00	36500.00	7.9%	100111.46
Vietjet Aviation	38000.00	42400.00	-10.4%	81282.00	Sai Gon Thuong Tin Commercial	48800.00	44225.42	10.3%	62439.60

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