

Daily Market Report

1 September 2021

JSE

JSE All-Share Index increased by 0.54% to close at 67,427.94 points on Tuesday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 176.31 points, rose by 0.41% on Tuesday with Sicom Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NSE All-Share decreased by 0.27% to close at 39,219.61 points on Tuesday, as the Insurance, Banking, Consumer and Oil & Gas sectors recorded losses.

EGX

EGX 30 Index decreased by 0.17% and closed at 11,143.80 points on Tuesday, as the market lost LE 3.16 billion of market cap, amid Arab selling.

ESG

Casablanca ESG 10 Index closed at 954.12 points on Tuesday, as it fell by 0.65%.

African Markets

Nigeria: NSE 30 Index declined by 0.32% and closed at 1,616.80 points on Tuesday. Nigerian Breweries and Fidelity were the top losers.

Egypt: EGX 30 Index decreased by 0.17% and closed at 11,143.80 points on Tuesday, as the market lost LE 3.16 billion of market cap, amid Arab selling.

Kenya: NSE 20 Index declined by 0.55% and closed at 2,020.77 points on Tuesday. Stanbic Holdings and Safaricom were the top losers.

South Africa: JSE Top 40 Index increased by 0.48% to close at 61,039.26 points on Tuesday, as the Industrial and Financial sectors recorded gains.

Capital Markets

JSE Johannesburg Stock Exchange ▲ 0.54%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 0.41%

NSE Nigerian Stock Exchange ▼ 0.27%

EGX Egyptian Stock Exchange ▼ 0.17%

ESG Casablanca Stock Exchange ▼ 0.65%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.32

INTERBANK RATES

OBB	6.00 ▼
Overnight	6.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General edged down by 0.003% to close at 7,684.62 points on Tuesday, as Abu Dhabi National Hotels and Sharjah Insurance recorded losses. MSCI UAE Index declined marginally by 0.01% to close at 403.74 points.

Vietnam: VN-30 Index decreased by 0.17% to close at 1,428.66 points on Tuesday, as the blue-chip companies recorded losses. MSCI Vietnam rose by 0.46% to close at 1016.29 points.

Saudi Arabia: Tadawul All Share Index increased by 0.57% to close at 11,319.24 points on Tuesday, as gains in the Telecoms & IT, Retail and Energy & Utilities sectors led shares higher. MSCI Tadawul 30 Index rose 0.84% to close at 1,533.85 points.

India: Nifty 50 market advanced by 1.19% to close at 17,132.20 points on Tuesday, as gains in the Green Energy, Technology and Consumer Durables sectors propelled shares higher. MSCI Nifty 50 Index rose by 1.44% to close at 1,971.65 points.

News

Nigeria:

External reserves gain \$500m in one week, near \$34bn
FG disburses ₦56.8bn to one million MSMEs
United Capital Quotes ₦19.72bn Series CPs on FMDQ Exchange

Kenya:

Sh13bn bad loan provision cuts lift bank profits
Companies NSE rally returns Britam to half-year profit
NBV boss to raise his stake to 94pc in acquisition bid

Abu Dhabi:

Big bank earnings: Profits at UAE's major lenders reached \$4bn in H1 2021
Abu Dhabi exchange waives trading commission fee on all listed securities
Adnoc partners with Pakistani energy firms for the first time

Saudi Arabia:

OPEC August oil output rises, but outages limit gain
Saudi power major ACWA said to eye more than \$1bn from IPO
Saudi Chemical Co's subsidiary signs deal with Eli Lilly to manufacture insulin

Egypt:

Egypt's M2 money supply up 17.2% year-on-year in July -CBE
Egypt injects LE 3.4B investments in new Beni Suef
Orascom Financial Holding records profits of LE 36.66M

South Africa:

Eskom cuts debt by R82bn, reduces net loss
Steinhoff considers listing US subsidiary
Mattress Firm to raise cash
Prosus takes on global payments giants with R68bn Billdesk purchase

India:

Q1 GDP: Private consumption rises sharply, government spending down
Fiscal deficit for April-July period reaches 21.3% of full year target
LIC's asset base goes past Rs 38 lakh crore in fiscal 2021

Vietnam:

Retail sales of goods and services plunge in January-August
Hanoi attracts over 840 million USD in FDI in eight months
Vietnam's exports of non-alcoholic drinks grow impressively in Australia

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,684.62	-0.003%	0.8%	0.0%	52.3%	AED/USD	3.67	0.0%	0.0%
Egypt	11,143.80	-0.2%	0.2%	0.0%	2.8%	EGP/USD	15.70	0.0%	-0.2%
India	17,132.20	1.2%	2.6%	0.0%	22.5%	INR/USD	73.01	-0.4%	-0.1%
Kenya	2,020.77	-0.6%	-0.7%	0.0%	8.2%	KES/USD	109.90	0.0%	0.6%
Nigeria	1,616.80	-0.3%	-0.8%	0.0%	-1.4%	NGN/USD	412.00	0.0%	4.4%
Saudi Arabia	11,319.24	0.6%	1.7%	0.0%	30.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	61,039.26	0.5%	-0.6%	0.0%	12.2%	ZAR/USD	14.47	-0.9%	-1.5%
Vietnam	1,428.66	-0.2%	0.7%	0.0%	33.4%	VND/USD	22,782.50	0.0%	-1.3%

MSCI Emerging Markets

MSCI Frontier	656.81	-0.5%	-0.3%	0.0%	14.9%	Brent Crude (\$)	72.99	-0.6%	40.9%
MSCI Frontier 100	1,483.32	-0.5%	-0.3%	0.0%	17.9%	Gold (\$)	1,818.10	0.3%	-4.1%
MSCI Emerging	1,308.67	1.8%	2.8%	0.0%	1.3%	Copper (\$)	9,520.00	1.2%	22.6%
MSCI World (USD)	3,141.35	-0.2%	0.2%	0.0%	16.8%	Coffee (\$)	172.08	2.5%	44.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	5.17	10.0%	43.6%	0.84	Nigerian Breweries	49.45	-9.9%	-11.7%	167.96
Transnational Corporation	0.91	1.1%	1.1%	99.98	Wema	0.86	-4.4%	24.6%	15.04
Access	9.10	1.1%	7.7%	68.61	Fidelity	2.35	-1.7%	-6.7%	48.49
UBA	7.60	0.7%	-12.1%	51.81	Sterling	1.52	-1.3%	-25.5%	12.34
United Capital PLC	7.18	0.1%	72.2%	74.26	International Breweries	4.65	-1.1%	-21.8%	1.09
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	11.00	11.00	0.0%	20.45	UBN	5.35	4.65	15.1%	1.04
Transcorp Hotels	5.17	5.17	0.0%	0.84	Cap	19.50	15.25	27.9%	0.29
Total	199.20	199.20	0.0%	5.84	Unilever	13.50	10.50	28.6%	3.58
Seplat Petroleum	759.70	759.70	0.0%	2.19	Ecobank	5.20	3.90	33.3%	12.46
Okomu Oil	110.00	110.00	0.0%	1.52	Sterling	1.52	1.13	34.5%	12.34

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Zee Store	30.08	15.0%	186.5%	0.09	Abu Dhabi National Hotels	3.74	-9.9%	33.6%	7.65
Esg Emirates Stallions Group	8.08	14.9%	94.2%	3.46	Sharjah Insurance	1.30	-9.7%	-38.4%	0.69
Easylease motorcycle rentals	58.15	14.9%	230.4%	0.97	Abu Dhabi National for Building Materials	0.30	-6.5%	15.8%	0.03
Sharjah Group Co.	1.18	14.6%	38.8%	0.00	RAK Co. for White Cement & Construction	0.93	-4.5%	9.7%	0.02
PALMS SPORTS	19.02	10.3%	44.1%	18.35	Bank of Sharjah PJSC	0.56	-4.3%	-11.9%	0.21
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	58.15	58.15	0.0%	0.97	Al Ain Ahlia Ins.	29.20	29.20	0.0%	0.00
Zee Stores PJSC	30.08	30.08	0.0%	0.09	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	Sharjah Insurance	1.30	1.30	0.0%	0.69

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Fawry For Banking Tech & Electronic Payment	16.29	5.4%	-37.7%	107.08	Speed Medical	2.02	-8.2%	23.9%	100.10
Misir Fertilizers Production Company - Mopco	82.43	1.9%	40.2%	2.66	Citadel Capital - Common Shares	1.27	-2.5%	-11.9%	9.16
Credit Agricole Egypt	27.27	1.8%	-6.0%	24.88	Egyptian for Tourism Resorts	2.49	-2.4%	75.4%	41.84
Eastern Company	11.77	1.0%	-9.7%	30.01	Heliopolis Housing	5.77	-2.0%	-5.4%	24.93
T M G Holding	7.23	0.4%	10.0%	16.91	Raya Holding For Financial Investments	2.76	-1.8%	278.1%	0.82
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	14.73	14.73	0.0%	4.47	Commercial International Bank(Egypt)	46.80	46.80	0.0%	159.17
Sidi Kerir Petrochemicals	10.52	10.52	0.0%	9.88	GB AUTO	4.01	4.01	0.0%	1.91
Pioneers Holding	5.65	5.65	0.0%	14.73	Medinet Nasr Housing	3.06	3.06	0.0%	8.20
Oriental Weavers	8.53	8.53	0.0%	3.88	Palm Hills Development	1.95	1.95	0.0%	7.59
MM Group For Industry And International Trade	7.70	7.70	0.0%	8.34	T M G Holding	7.23	7.23	0.0%	16.91

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	662.00	6.7%	29.9%	38609.550	Tata Motors	287.60	-1.5%	56.4%	10623.78
Bajaj Finance	7529.00	5.1%	42.2%	21712.48	Nestle India Limited	19500.00	-1.2%	6.0%	4435.40
Hindalco Industries	470.00	4.9%	95.4%	9598.05	Indusind Bank	992.95	-1.2%	11.0%	3126.63
Eicher Motors	2674.00	4.7%	5.7%	6216.43	Reliance Industries	2257.00	-0.6%	13.7%	27594.97
Shree Cement limited	28250.00	4.0%	17.6%	2852.12	Power Grid Corp Of India	175.35	-0.1%	-7.6%	5703.59
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Tata Consumer products ltd.	866.75	867.70	-0.1%	1839.79	Hero Motocorp	2737.00	2636.00	3.8%	1931.98
Tata Consultancy Svs.	3797.90	3804.10	-0.2%	12071.09	Maruti Suzuki India	6836.30	6270.15	9.0%	6417.35
Titan Company	1920.00	1925.00	-0.3%	3463.77	Dr Reddys Lab	4709.85	4135.00	13.9%	3030.06
Icici Bank	718.00	719.90	-0.3%	14174.81	Britannia Inds.	3984.60	3317.30	20.1%	2749.40
Asian Paints	3200.00	3210.00	-0.3%	7240.54	Reliance Industries	2257.00	1830.00	23.3%	27594.97

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
NCBA Group Plc	28.15	2.0%	5.2%	5.43	Stanbic Holdings	91.00	-4.5%	7.1%	0.51
Total Kenya Ltd	25.80	1.0%	7.5%	0.03	Safaricom Plc	42.60	-2.5%	24.4%	277.12
WPP Scangroup Plc	3.60	0.8%	-40.0%	3.66	East African Breweries Limited	175.75	-1.5%	13.9%	50.60
Kenya Power & Lighting Limited	1.40	0.7%	-18.1%	0.45	Equity Group Holdings Plc	53.25	-1.4%	45.7%	283.84
Kengen Limited	4.71	0.6%	0.0%	0.44	British American Tobacco Kenya Ltd	460.00	-1.3%	27.4%	30.31
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)
Absa Bank Kenya	10.95	11.15	-1.8%	3.12	WPP Scangroup Plc	3.60	3.50	2.9%	3.66
The Cooperative Bank of Kenya Ltd	13.65	14.05	-2.8%	5.80	Standard Chartered Bank Kenya Ltd	138.25	127.00	8.9%	1.29
NCBA Group Plc	28.15	29.00	-2.9%	5.43	Diamond Trust Bank Limited	65.00	57.50	13.0%	1.09
Equity Group Holdings Plc	53.25	55.00	-3.2%	283.84	East African Breweries Limited	175.75	148.00	18.8%	50.60
KCB Group Plc	48.50	50.75	-4.4%	104.33	Centum Investment Company Plc	16.80	14.05	19.6%	0.63

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Petrochemical Co.	47.50	5.8%	42.9%	39.51	Saudi Real Estate	25.45	-2.1%	68.3%	28.77
Amana Cooperative Insurance Co.	54.20	4.0%	45.9%	15.68	Al-Jouf Agricultural Development Co.	77.30	-1.8%	110.6%	222.96
Etihad Atheeb Telecommunication Co.	31.75	3.9%	187.1%	126.05	Saudi Ceramic Co.	65.70	-1.7%	82.7%	16.33
Batic Investments and Logistics Co.	41.00	3.9%	17.5%	117.77	Tabuk Agricultural Development Co.	38.35	-1.5%	18.4%	96.98
Baazeem Trading Co.	137.40	3.9%	52.3%	291.01	Rabigh Refining and Petrochemical	24.62	-1.4%	78.1%	43.50
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	67.60	67.60	0.0%	84.57	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.80	60.80	0.0%	297.56	BinDawood Holding Co.	108.00	105.60	2.3%	8.65
Zamil Industrial Investment Co.	37.55	37.55	0.0%	17.16	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	50.60	50.60	0.0%	81.21	Savola Group	40.15	36.60	9.7%	30.54
United Electronics Co.	143.00	143.00	0.0%	29.07	Saudi Airlines Catering Co.	81.90	70.50	16.2%	42.93

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	248000.00	6.4%	-17.9%	497803.70	BHP Group	45272.00	-2.9%	16.4%	76411.49
Old Mutual Limited	1536.00	5.4%	29.2%	45623.32	Mondi	40036.00	-2.9%	16.7%	14305.10
Redefine Properties	460.00	5.3%	38.1%	10756.80	Anglo American	61320.00	-2.8%	29.2%	60392.60
Prosus (JSE)	126736.00	5.3%	-21.1%	285672.96	Sasol Limited	22400.00	-0.7%	67.3%	42622.50
Nedbank Group	18500.00	3.4%	42.9%	51132.09	RMB Holdings Ltd	147.00	-0.7%	76.8%	198.63
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)
Old Mutual Limited	1536.00	1536.00	0.0%	45623.32	Brit.Amer.Tobacco	54377.00	50757.00	7.1%	34399.60
Aspen Phmcr.Hdg.	19611.00	19611.00	0.0%	54066.23	Anglogold Ashanti	24391.00	22600.00	7.9%	34855.76
Capitec Bank	189770.00	189988.00	-0.1%	48889.12	Naspers Ltd	248000.00	229087.00	8.3%	497803.70
Standard Bank Group	14871.00	14927.00	-0.4%	60792.96	Prosus	126736.00	114101.00	11.1%	285672.96
Firststrand Ltd	6189.00	6213.00	-0.4%	105394.39	Gold Fields	13648.00	12193.00	11.9%	58529.98

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
BaoViet Holdings	57000.00	3.6%	-13.6%	146777.69	Ho Chi Minh City Devp	25950.00	-2.8%	9.3%	51261.85
Vietnam Rubber Group JSC	38750.00	3.1%	29.4%	372469.87	Sai Gon Thuong Tin Commercial	27350.00	-2.0%	-15.8%	330932.22
Phat Dat Real Estate Development Corp	87900.00	2.8%	109.7%	304467.35	Military Commercial Bank	27900.00	-1.8%	65.3%	292028.32
Petrovietnam Gas	89400.00	2.2%	6.5%	77807.39	Tien Phong Commercial Joint Stock Bank	34100.00	-1.6%	8.3%	65890.56
Saigon Beer Alcohol Beverage Corp.	150000.00	1.9%	-23.1%	24201.42	Vietnam JSC Bank	31800.00	-1.6%	18.8%	393601.34
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	61600.00	61600.00	0.0%	331133.40	Khang Dien House Trading & Investment	39750.00	39750.00	0.0%	107506.16
Vietjet Aviation	126500.00	126500.00	0.0%	132728.50	Military Commercial Bank	27900.00	27900.00	0.0%	292028.32
Vingroup JSC	94100.00	94100.00	0.0%	144.318.00	Vietnam National Petroleum Group	49700.00	49700.00	0.0%	54706.09
Vinhomes	106400.00	106400.00	0.0%	1127346.26	PetroVietnam Power Corp	11850.00	11850.00	0.0%	113016.13
Techcombank	48500.00	48500.00	0.0%	380362.51	Saigon Beer Alcohol Beverage	150000.00	150000.00	0.0%	24.201.42

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