

Daily Market Report

2 September 2021

JSE

JSE All-Share Index decreased by 0.67% to close at 66,976.06 points on Wednesday, as the Resources and Financial sectors recorded losses.

BRVM

BRVM Composite Index closed at 176.12 points, down by 0.11% on Wednesday with Servair Abidjan Côte d'Ivoire and Crown Siem Côte d'Ivoire being the top losers.

NSE

NSE All-Share inched down by 0.09% to close at 39184.18 points on Wednesday, as the Insurance, Banking, Consumer and Oil and Gas sectors recorded losses.

EGX

EGX 30 Index increased by 1.26% and closed at 11,283.70 points on Wednesday, as the market gained LE 8.13 billion of market cap, amid Arab and foreign buying.

ESG

Casablanca ESG 10 Index closed at 954.08 points on Wednesday, as it slipped by -0.004%.

African Markets

Nigeria: NSE 30 Index slipped by 0.07% and closed at 1,615.61 points on Wednesday. Nigerian Breweries and Access were the top losers.

Egypt: EGX 30 Index increased by 1.26% and closed at 11,283.70 points on Wednesday, as the market gained LE 8.13 billion of market cap, amid Arab and foreign buying.

Kenya: NSE 20 Index increased by 0.27% and closed at 2,026.14 points on Wednesday. WPP Scangroup and Kengen were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.70% to close at 60,612.64 points on Wednesday, as the Resources and Financial sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.67%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.11%

NSE Nigerian Stock Exchange ▼ 0.09%

EGX Egyptian Stock Exchange ▲ 1.26%

ESG Casablanca Stock Exchange ▼ 0.004%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.35

INTERBANK RATES

OBB	4.50 ▼
Overnight	5.00 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.46% to close at 7649.31 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index rose by 0.01% to close at 403.76 points.

Vietnam: VN-30 Index decreased by 0.12% to close at 1,426.94 points on Wednesday, as the blue-chip companies recorded losses. MSCI Vietnam inched up by 0.07% to close at 1017.03 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.08% to close at 11,310.54 points on Wednesday, as losses in the Retail, Telecoms & IT and Building & Construction sectors led shares lower. MSCI Tadawul 30 Index fell 0.17% to close at 1,531.17 points.

India: Nifty 50 market decreased by 0.33% to close at 17,076.25 points on Wednesday as losses in the Metals, IT and Technology sectors propelled shares lower. MSCI Nifty 50 Index was down by 0.15% to close at 1,995.40 points.

News

Nigeria:

OPEC Leaves Oil Output Unchanged, Forecasts Higher Demand
Lagos to secure 185bn bond following positive financial ratings
AfDB, partners mobilise \$520m for agric zones in Nigeria

Kenya:

Kenya's August Inflation Rises to 6.57%
Kenya & Pakistan Agree to Remove Non-Tariff Barriers
Kenya Launches Web Portal to Attract Investments in Special Economic Zones

Abu Dhabi:

ADX plans derivatives market launch in Q4
Abu Dhabi Utility Taqa May Sell Oil and Gas Assets After Review
Wealth in Dubai grows by Dh143 billion to nearly Dh2 trillion

Saudi Arabia:

Saudi Arabia's ACWA Power IPO to raise more than \$1bn
Saudi Batic extends deal to acquire 35.8% of Smart Cities Solutions
HSBC Saudi Arabia launches first climate change fund

Egypt:

'Suez Canal on rails' - Egypt signs \$4.5bn high-speed rail deal
Speed Medical signs LE 1.57B financing contract with GEM investment fund
Egyptian Commodity Exchange to start operation in Q1 2022

South Africa:

SA factory mood rises as economy steadies after riots
JSE, Investec share plan deal closes
Old Mutual hikes its Covid-19 provision as it returns to profitability in half year

India:

August GST collections come in at Rs 1.12 lakh crore
Zerodha gets Sebi's in-principle approval for starting AMC operations
Manufacturing growth slows in August, PMI at 52.3

Vietnam:

Std Chartered Vietnam increases charter capital, reinforcing its local commitment
Efforts needed to bring electronic exports to 50 billion USD this year
Reference exchange rate adjusted down 21 VND on Sept. 1

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,649.31	-0.5%	0.3%	-0.5%	51.6%	AED/USD	3.67	0.0%	0.0%
Egypt	11,283.70	1.3%	1.4%	1.3%	4.0%	EGP/USD	15.72	0.1%	-0.1%
India	17,076.25	-0.3%	2.2%	-0.3%	22.1%	INR/USD	73.09	0.1%	0.0%
Kenya	2,026.14	0.3%	-0.4%	0.3%	8.4%	KES/USD	109.90	0.0%	0.6%
Nigeria	1,615.61	-0.1%	-0.8%	-0.1%	-1.5%	NGN/USD	412.00	0.0%	4.4%
Saudi Arabia	11,310.54	-0.1%	1.6%	-0.1%	30.2%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,612.64	-0.7%	-1.3%	-0.7%	11.5%	ZAR/USD	14.38	-0.6%	-2.1%
Vietnam	1,426.94	-0.1%	0.6%	-0.1%	33.3%	VND/USD	22,765.00	-0.1%	-1.4%

MSCI Emerging Markets

MSCI Frontier	659.94	0.5%	0.1%	0.5%	15.4%	Brent Crude (\$)	71.29	-2.3%	37.6%
MSCI Frontier 100	1,489.51	0.4%	0.1%	0.4%	18.4%	Gold (\$)	1,816.00	-0.1%	-4.2%
MSCI Emerging	1,312.44	0.3%	3.1%	0.3%	1.6%	Copper (\$)	9,335.50	-1.9%	20.2%
MSCI World (USD)	3,151.67	0.3%	0.6%	0.3%	17.2%	Coffee (\$)	169.92	-1.3%	42.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	6.55	3.1%	12.0%	5.35	Wema	0.82	-4.7%	18.8%	1.65
Fidelity	2.41	2.6%	-4.4%	11.92	Nigerian Breweries	48.00	-2.9%	-14.3%	103.38
P Z Cussons	5.80	0.9%	9.4%	11.61	Axamansard	0.86	-2.3%	-18.1%	0.75
Sterling	1.53	0.7%	-25.0%	1.48	UACN	10.80	-1.8%	49.0%	6.33
					Access	9.00	-1.1%	6.5%	38.47
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	10.80	10.80	0.0%	6.33	UBN	5.35	4.65	15.1%	0.50
Transcorp Hotels	5.17	5.17	0.0%	1.04	Cap	19.50	15.25	27.9%	0.11
Total	199.20	199.20	0.0%	2.13	Unilever	13.50	10.50	28.6%	3.32
Seplat Petroleum	759.70	759.70	0.0%	128.78	Ecobank	5.20	3.90	33.3%	3.29
Okomu Oil	110.00	110.00	0.0%	22.23	Cadbury	8.50	6.30	34.9%	0.58

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Ain Ahlia Ins.	33.58	15.0%	-9.2%	0.19	Gulf Medical Projects	1.75	-9.8%	-27.1%	0.01
ZEE STORE PRJSC	34.52	14.8%	228.8%	14.78	Abu Dhabi National Hotels	3.50	-6.4%	25.0%	1.76
Sharjah Group Co.	1.30	10.2%	52.9%	0.00	Gulf Pharmaceutical Ind.	2.08	-6.3%	56.4%	5.82
RAK Co. for White Cement & Construction	0.99	6.3%	16.6%	1.13	Agthia Group	6.30	-6.0%	48.2%	3.39
Abu Dhabi National for Building Materials	0.32	6.0%	22.8%	0.02	Sharjah Cement	0.64	-4.8%	-15.7%	0.13
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£)
Pioneers Holding	5.89	4.3%	46.5%	32.02	Heliopolis Housing	5.72	-0.9%	-6.2%	10.87
Fawry For Banking TechnologyAnd Electronic Payment	16.84	3.4%	-35.6%	61.20	Raya Holding For Financial Investments	2.74	-0.7%	275.3%	1.01
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.96	2.8%	-22.1%	9.86	Misr Fertilizers Production Company - Mopco	81.89	-0.7%	39.3%	2.24
T M G Holding	7.43	2.8%	13.1%	24.45	Eastern Company	11.75	-0.2%	-9.9%	26.08
Ezz Steel	15.28	2.6%	42.4%	15.63					

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	14.90	14.90	0.0%	14.21	Commercial International Bank(Egypt)	47.47	47.47	0.0%	64.61
Sidi Kerir Petrochemicals	10.59	10.59	0.0%	6.07	GB AUTO	4.08	4.08	0.0%	8.13
Pioneers Holding	5.89	5.89	0.0%	32.02	Medinet Nasr Housing	3.09	3.09	0.0%	9.78
Oriental Weavers	8.53	8.53	0.0%	5.92	Palm Hills Development Company	2.00	2.00	0.0%	14.68
MM Group For Industry AndInternational Trade	7.77	7.77	0.0%	23.24	T M G Holding	7.43	7.43	0.0%	24.45

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Asian Paints	3300.50	3.1%	19.4%	7990.736	Mahindra & Mahindra	769.80	-3.0%	6.8%	4675.11
Tata Motors	294.65	2.6%	60.3%	9664.47	Cipla	921.90	-2.7%	12.4%	4142.21
SBI Life Insurance	1214.40	1.9%	34.3%	2364.90	Tata Steel	1410.95	-2.7%	119.2%	12532.29
Nestle India Limited	19805.00	1.7%	7.7%	2070.19	Hindalco Industries	458.00	-2.2%	90.4%	4649.63
Axis Bank	798.40	1.5%	28.7%	16118.56	Bajaj Finserv	16788.00	-2.1%	88.5%	7823.49

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Titan Company	1943.95	1953.95	-0.5%	2416.00	Hero Motocorp	2740.00	2636.00	3.9%	1214.98
Britannia Inds.	4001.00	4027.30	-0.7%	1410.54	Maruti Suzuki India	6786.00	6270.15	8.2%	7498.70
SBI Life Insurance	1214.40	1222.80	-0.7%	2364.90	Dr Reddys Lab	4758.40	4135.00	15.1%	2673.11
Asian Paints	3300.50	3333.00	-1.0%	7990.74	Britannia Inds.	4001.00	3317.30	20.6%	1410.54
Wipro	640.75	647.35	-1.0%	3030.62	Reliance Industries	2266.00	1830.00	23.8%	11698.03

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	4.06	12.8%	-32.3%	5.00	Nairobi Securities Exchange Plc	9.68	-4.6%	18.6%	0.53
Kengen Limited	4.83	2.5%	2.5%	0.85	Total Kenya Ltd	25.30	-1.9%	5.4%	0.04
East African Breweries Limited	176.75	0.6%	14.6%	2.76	Equity Group Holdings Plc	52.50	-1.4%	43.6%	27.07
Diamond Trust Bank Limited	65.25	0.4%	-13.0%	0.26	Kenya Reinsurance Corporation Ltd	2.45	-1.2%	5.6%	2.48
Centum Investment Company Plc	16.85	0.3%	5.0%	0.30	KCB Group Plc	48.00	-1.0%	26.0%	81.52

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	10.90	11.15	-2.2%	7.03	Standard Chartered Bank Kenya Ltd	137.75	127.00	8.5%	10.90
NCBA Group Plc	28.05	29.00	-3.3%	3.67	Diamond Trust Bank Limited	65.25	57.50	13.5%	0.26
The Cooperative Bank of Kenya Ltd	13.55	14.05	-3.6%	16.38	WPP Scangroup Plc	4.06	3.50	16.0%	5.00
Equity Group Holdings Plc	52.50	55.00	-4.5%	27.07	East African Breweries Limited	176.75	148.00	19.4%	2.76
KCB Group Plc	48.00	50.75	-5.4%	81.52	Kenya Power & Lighting Limited	1.39	1.16	19.8%	0.37

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.	73.70	10.0%	34.0%	317.43	Etihaad Atheeb Telecommunication	31.00	-2.4%	180.3%	60.83
Tanmiah Food Co.	117.80	5.2%	75.8%	352.17	Mobile Telecom Co Saudi Arabia	14.14	-2.4%	4.0%	144.79
Raydan Food Co.	30.50	5.2%	-7.6%	81.03	Jarir Marketing Co.	212.20	-2.0%	22.4%	32.26
National Gas and Industrialization Co.	53.70	4.5%	76.1%	64.05	Saudi Public Transport Co.	28.00	-1.8%	56.1%	68.93
Al-Baha Investment and Development Co.	39.90	3.6%	2.0%	90.28	National Petrochemical Co.	46.70	-1.7%	40.5%	13.52
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	66.90	66.90	0.0%	32.58	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.20	61.20	0.0%	211.99	BinDawood Holding Co.	108.00	105.60	2.3%	6.87
Zamil Industrial Investment Co.	37.45	37.45	0.0%	15.58	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%	40.45	Savola Group	40.10	36.60	9.6%	16.51
United Electronics Co.	142.20	142.20	0.0%	24.44	Saudi Airlines Catering Co.	83.00	70.50	17.7%	78.11

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Old Mutual Limited	1650.00	7.4%	38.8%	53953.44	BHP Group	41350.00	-8.7%	6.3%	48325.17
Prosus (JSE)	132934.00	4.9%	-17.2%	128213.78	Anglo American Platinum	158035.00	-4.1%	16.2%	22373.65
Naspers Ltd	259000.00	4.4%	-14.2%	229366.00	ABSA Group	15306.00	-3.2%	27.7%	38010.72
Discovery Ltd	13145.00	2.1%	-14.4%	20013.16	Northam Platinum	19421.00	-2.9%	-7.3%	25513.48
Remgro Limited	12209.00	1.1%	26.9%	12785.13	Aspen Phmc.R.Hdg.	19051.00	-2.9%	52.0%	8666.17
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	1650.00	1650.00	0.0%	53953.44	Brit.Amer.Tobacco	53666.00	50757.00	5.7%	23703.90
FirstRand Ltd	6195.00	6256.00	-1.0%	76490.85	Anglogold Ashanti	24548.00	22600.00	8.6%	26162.06
Clicks Group	30325.00	30774.00	-1.5%	19836.58	Gold Fields	13545.00	12193.00	11.1%	17210.60
Sanlam Limited	6450.00	6546.00	-1.5%	22239.27	Naspers Ltd	259000.00	229087.00	13.1%	229366.00
Shoprite Limited	18189.00	18462.00	-1.5%	17060.79	Reinet Investments	28390.00	24721.00	14.8%	4861.84

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
PetroVietnam Power Corp	12450.00	5.1%	-8.5%	361.040.54	Phat Dat Real Estate Devpt Corp	85700.00	-2.5%	104.5%	229614.06
Vietnam Rubber Group JSC	40100.00	3.5%	33.9%	334091.68	Masan Group Corp	133300.00	-1.3%	51.2%	137413.86
Vietnam National Petroleum Group	50800.00	2.2%	-5.0%	66826.71	Ho Chi Minh City Devp	25650.00	-1.2%	8.0%	80706.13
Vincom Retail	27900.00	2.2%	-74.1%	98632.80	Khang Dien House Trading & Investment	39300.00	-1.1%	47.5%	44.679.56
Vinamilk	88100.00	0.8%	-18.6%	302.021.22	Saigon Securities	61200.00	-1.0%	192.1%	575767.19
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	61500.00	61500.00	0.0%	402.134.42	Khang Dien House Trading & Investment	39300.00	39300.00	0.0%	44.679.56
Vietjet Aviation	125500.00	125500.00	0.0%	108321.51	Military Commercial Bank	27900.00	27900.00	0.0%	356.274.25
Vingroup JSC	94100.00	94100.00	0.0%	123064.95	Vietnam National Petroleum Group	50800.00	50800.00	0.0%	66826.71
Vinhomes	107000.00	107000.00	0.0%	2357337.92	PetroVietnam Power Corp	12450.00	12450.00	0.0%	361.040.54
Techcombank	48300.00	48300.00	0.0%	412907.95	Saigon Beer Alcohol Beverage Corp.	148700.00	148700.00	0.0%	10.196.35

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