

# Daily Market Report

## 3 September 2021

### JSE

JSE All-Share Index decreased by 0.48% to close at 66,654.25 points on Thursday, as the Resource and Industrial sectors recorded losses.

### BRVM

BRVM Composite Index closed at 176.76 points, rose by 0.64% on Thursday with Crown Siem Côte d'Ivoire and Tractafrica Motors Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share increased by 0.17% to close at 39252.19 points on Thursday, as Insurance, Banking and Industrial sectors recorded gains.

### EGX

EGX 30 Index increased by 0.16% and closed at 11,301.36 points on Thursday, as the market gained LE 4.58 billion of market cap, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index closed at 954.43 points on Thursday, as it inched up by 0.04%.

## African Markets

**Nigeria:** NSE 30 Index increased by 0.17% and closed at 1,618.39 points on Thursday. Julius Berger and Access were the top gainers.

**Egypt:** EGX 30 Index increased by 0.16% and closed at 11,301.36 points on Thursday, as the market gained LE 4.58 billion of market cap, amid Arab and foreign buying.

**Kenya:** NSE 20 Index decreased marginally by 0.09% and closed at 2,024.40 points on Thursday. Kengen and Absa Bank Kenya were the top losers.

**South Africa:** JSE Top 40 Index decreased by 0.42% to close at 60,357.49 points on Thursday, as the Resources and Industrial sectors recorded losses.

## Capital Markets

### JSE

Johannesburg Stock Exchange ▼ 0.48%

### BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.64%

### NSE

Nigerian Stock Exchange ▲ 0.17%

### EGX

Egyptian Stock Exchange ▲ 0.16%

### ESG

Casablanca Stock Exchange ▲ 0.04%

## Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.37

## INTERBANK RATES

OBB	4.33 ▼
Overnight	4.83 ▼

## Other Emerging Markets

**Abu Dhabi:** ADX General increased marginally by 0.05% to close at 7652.978 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index was up by 0.15% to close at 404.38 points.

**Vietnam:** VN-30 Index remained closed on Thursday on account of National Day.

**Saudi Arabia:** Tadawul All Share Index inched up by 0.08% to close at 11,319.87 points on Thursday, as gains in the Real Estate Development, Multi Investment and Hotels & Tourism sectors led shares higher. MSCI Tadawul 30 Index slipped by 0.09% to close at 1,529.78 points.

**India:** Nifty 50 market increased by 0.92% to close at 17,234.15 points on Thursdays, as gains in the Fast-Moving Consumer Goods, IT and Consumer Durables sectors propelled shares higher. MSCI Nifty 50 Index rose by 0.98% to close at 2,014.88 points.

## News

### Nigeria:

Access Bank grows half-year profit by 31.21%  
Lagos to issue N125bn bond for capital projects  
Edo, Bol launch N2bn fund for MSME development

### Kenya:

August forex reserves down Sh39bn on loan repayments  
Shilling at 7-month low on depressed tourism inflows  
Kenya Roads Board to Spend KSh55 Billion for Road Maintenance

### Abu Dhabi:

SABIC, China's FJPEC in JV pact for \$6bn petrochemical complex  
BRICS-backed New Development Bank admits UAE as new member  
UAE's Agthia to fully acquire Dubai-based snack company BMB Group

### Saudi Arabia:

Saudi energy giant confirms plan to list on Tadawul  
Saudi's PIF and Tadawul plan voluntary exchange platform for carbon credits  
Saudi Arabia and Iraq sign maritime transport, trading agreements

### Egypt:

Egypt records GDP of 3.3% during 2020/21: Planning Minister  
Misr Capital launches fund to invest in debt instruments, with initial size of \$6.3mIn  
Egypt cooperates with Siemens, KAMS to connect oil platforms, wells digitally

### South Africa:

Discovery scraps dividend, flags possible capital raise  
Aspen pays dividend after slashing debt levels  
Truworths sees annual profit rise as lockdown eases

### 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:

Batavia completes Vietnam offshore oilfield acquisition  
Standard Chartered revises down Vietnam's GDP growth forecast to 4.7%  
KKR Leads Series B Funding Round in Vietnam's KiotViet

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,652.98	0.0%	0.4%	-0.4%	51.7%	AED/USD	3.67	0.0%	0.0%
Egypt	11,301.36	0.2%	1.6%	1.4%	4.2%	EGP/USD	15.72	0.0%	-0.1%
India	17,234.15	0.9%	3.2%	0.6%	23.3%	INR/USD	73.07	0.0%	0.0%
Kenya	2,024.40	-0.1%	-0.5%	0.2%	8.3%	KES/USD	110.00	0.1%	0.7%
Nigeria	1,618.39	0.2%	-0.7%	0.1%	-1.3%	NGN/USD	412.00	0.0%	4.4%
Saudi Arabia	11,319.87	0.1%	1.7%	0.0%	30.3%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,357.49	-0.4%	-1.7%	-1.1%	11.0%	ZAR/USD	14.39	0.1%	-2.0%
Vietnam	1,426.94	0.0%	0.6%	-0.1%	33.3%	VND/USD	22,765.00	0.0%	-1.4%

## MSCI Emerging Markets

MSCI Frontier	660.79	0.1%	0.3%	0.6%	15.6%	Brent Crude (\$)	72.84	2.2%	40.6%
MSCI Frontier 100	1,492.28	0.2%	0.3%	0.6%	18.6%	Gold (\$)	1,811.50	-0.2%	-4.4%
MSCI Emerging	1,311.91	0.0%	3.1%	0.2%	1.6%	Copper (\$)	9,376.50	0.4%	20.7%
MSCI World (USD)	3,161.46	0.3%	0.9%	0.6%	17.5%	Coffee (\$)	170.39	40.5%	42.9%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.85	3.7%	23.2%	1.14	UBN	5.00	-6.5%	-6.5%	53.60
Axamansard	0.89	3.5%	-15.2%	0.36	UACN	10.50	-2.8%	44.8%	7.94
Julius Berger	26.00	3.0%	46.1%	29.47	Transnational Corporation	0.89	-2.2%	-1.1%	32.46
Access	9.25	2.8%	9.5%	471.19	FCMB	3.00	-1.6%	-9.9%	1.74
United Capital PLC	7.34	2.2%	76.0%	39.70	Sterling	1.51	-1.3%	-26.0%	2.79
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	10.50	10.50	0.0%	7.94	UBN	5.00	4.65	7.5%	53.60
Transcorp Hotels	5.17	5.17	0.0%	0.40	Cap	19.50	15.25	27.9%	0.72
Total	199.20	199.20	0.0%	6.74	Unilever	13.50	10.50	28.6%	4.11
Seplat Petroleum	759.70	759.70	0.0%	31.77	Ecobank	5.20	3.90	33.3%	1.06
Okomu Oil	110.00	110.00	0.0%	18.04	Sterling	1.51	1.13	33.6%	2.79

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Sharjah Group Co.	1.49	14.6%	75.3%	0.00	PALMS SPORTS	17.10	-7.6%	29.5%	16.13
ZEE STORE PRJSC	37.92	9.9%	261.1%	28.08	Abu Dhabi National Hotels	3.33	-4.9%	18.9%	0.90
Bank of Sharjah PJSC	0.57	6.7%	-9.5%	0.47	Dana Gas PJSC	1.06	-3.6%	48.5%	16.36
Fujairah Cement Industries	0.55	5.4%	-58.4%	0.00	Arkan Building Materials	1.69	-3.4%	92.0%	22.64
RAK Co. for White Cement & Construction	1.02	3.0%	20.1%	0.12	Sudatel Telecom	0.37	-2.1%	-10.8%	0.11
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	Commercial Bank Intl	0.63	0.63	0.0%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Gulf Medical Projects	1.75	1.75	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	1.30	1.30	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£)
Pioneers Holding	6.19	5.1%	54.0%	64.29	Fawry For Banking Technology And Electronic Payment	16.46	-2.3%	-37.0%	56.19
GB AUTO	4.22	3.4%	27.1%	47.16	Orascom Development	5.09	-1.0%	3.9%	2.34
MM Group For Industry AndInternational Trade	7.94	2.2%	1.3%	14.29	Speed Medical	2.05	-1.0%	25.8%	37.25
Heliopolis Housing	5.84	2.1%	-4.3%	25.28	Sidi Kerir Petrochemicals	10.49	-0.9%	12.7%	23.67
Alexandria Mineral Oils Company	3.75	1.6%	20.2%	10.38	Egyptian for Tourism Resorts	2.53	-0.8%	78.2%	29.38
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	14.98	14.98	0.0%	5.78	Commercial International Bank	47.48	47.48	0.0%	64.46
Sidi Kerir Petrochemicals	10.49	10.49	0.0%	23.67	GB AUTO	4.22	4.22	0.0%	47.16
Pioneers Holding	6.19	6.19	0.0%	64.29	Medinet Nasr Housing	3.11	3.11	0.0%	12.75
Oriental Weavers	8.57	8.57	0.0%	2.10	Palm Hills Development Company	2.03	2.03	0.0%	11.25
MM Group For Industry AndInternational Trade	7.94	7.94	0.0%	14.29	T M G Holding	7.50	7.50	0.0%	20.52

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Shree Cement limited	30180.00	6.0%	25.7%	4687.511	Mahindra & Mahindra	755.00	-1.9%	4.8%	3702.70
HDFC Life Insurance Company Ltd	760.00	5.8%	12.3%	12287.98	ONGC	118.60	-0.9%	27.5%	1550.12
Cipla	955.00	3.5%	16.5%	3487.64	Bajaj Auto	3726.00	-0.9%	8.2%	1769.59
Tata Consultancy Svs.	3827.90	3.0%	33.7%	12927.69	Divi's Laboratories Limited	5163.00	-0.8%	34.4%	2153.42
HUL	2801.10	2.5%	16.9%	5431.91	Tata Motors	293.05	-0.8%	59.4%	4378.93
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Britannia Inds.	4098.85	4104.00	-0.1%	2135.89	Hero Motocorp	2731.00	2636.00	3.6%	1150.23
HUL	2801.10	2810.00	-0.3%	5431.91	Maruti Suzuki India	6780.00	6270.15	8.1%	5014.35
SBI Life Insurance	1245.15	1250.00	-0.4%	3054.97	Dr Reddys Lab	4849.65	4135.00	17.3%	6129.45
Nestle India Limited	20242.00	20325.00	-0.4%	1577.29	Britannia Inds.	4098.85	3317.30	23.6%	2135.89
Tata Consumer products Ltd.	870.65	875.00	-0.5%	1145.34	Reliance Industries	2293.00	1830.00	25.3%	10516.78

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	4.33	6.7%	-27.8%	11.58	Kengen Limited	4.60	-4.8%	-2.3%	0.19
Stanbic Holdings	94.00	3.3%	10.6%	0.01	Absa Bank Kenya	10.50	-3.7%	8.7%	0.81
British American Tobacco Kenya Ltd	465.00	1.9%	28.8%	0.14	Equity Group Holdings Plc	51.50	-1.9%	40.9%	6.54
Bamburi Cement Limited	38.00	1.3%	0.4%	13.55	KCB Group Plc	47.15	-1.8%	23.8%	19.74
Kenya Reinsurance Corporation Ltd	2.48	1.2%	6.9%	0.22	Total Kenya Ltd	25.05	-1.0%	4.4%	0.15
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)
NCBA Group Plc	27.95	29.00	-3.6%	0.77	Standard Chartered Bank Kenya Ltd	136.50	127.00	7.5%	0.37
The Cooperative Bank of Kenya Ltd	13.45	14.05	-4.3%	1.37	Diamond Trust Bank Limited	65.25	57.50	13.5%	0.36
Stanbic Holdings	94.00	99.00	-5.1%	0.01	Total Kenya Ltd	25.05	21.50	16.5%	0.15
Nation Media Group	25.10	26.50	-5.3%	0.11	Kengen Limited	4.60	3.90	17.9%	0.19
Absa Bank Kenya	10.50	11.15	-5.8%	0.81	East African Breweries Limited	175.75	148.00	18.8%	6.61

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Gas and Industrialization Co.	59.00	9.9%	93.4%	82.83	Tanmiah Food Co.	115.00	-2.4%	71.6%	161.66
Arabian Pipes Co.	20.40	5.8%	13.7%	123.95	Raydan Food Co.	29.80	-2.3%	-9.7%	106.19
Tihama Advertising and Public Relations Co.	53.10	4.9%	2.5%	127.43	Dallah Healthcare	76.10	-1.9%	57.7%	12.18
Tourism Enterprise Co.	77.00	4.5%	40.0%	475.61	Fitaihi Holding	33.00	-1.5%	85.6%	36.73
Zamil Industrial Investment Co.	38.85	3.7%	87.1%	82.07	United International Transportation Co.	49.90	-1.4%	31.3%	29.30
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	67.20	67.20	0.0%	42.43	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.20	61.20	0.0%	147.10	BinDawood Holding Co.	108.00	105.60	2.3%	4.69
Zamil Industrial Investment Co.	38.85	38.85	0.0%	82.07	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	49.90	49.90	0.0%	29.30	Savola Group	40.25	36.60	10.0%	14.02
United Electronics Co.	144.40	144.40	0.0%	15.84	Makkah Construction and Development Co.	64.10	54.00	18.7%	19.15

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Aspen PhmcR.Hdg.	19990.00	4.9%	59.4%	24878.95	Discovery Ltd	12120.00	-7.8%	-21.1%	58782.55
BHP Group	41887.00	1.3%	7.7%	43287.99	Impala Platinum	20426.00	-6.9%	1.2%	89379.17
Firststrand Ltd	6257.00	1.0%	22.6%	94857.14	Northam Platinum	18522.00	-4.6%	-11.6%	23277.12
Mondi	40406.00	1.0%	17.8%	6898.68	Anglo American Platinum	151186.00	-4.3%	11.2%	43565.46
Anglo American (JSE)	61202.00	0.8%	28.9%	50386.50	Gold Fields	13012.00	-3.9%	-5.4%	26156.93
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)
Aspen PhmcR.Hdg.	19990.00	20272.00	-1.4%	24878.95	Anglogold Ashanti	23949.00	22600.00	6.0%	26050.26
Firststrand Ltd	6257.00	6354.00	-1.5%	94857.14	Brit.Amer.Tobacco	54097.00	50757.00	6.6%	24582.00
Clicks Group	30250.00	30774.00	-1.7%	16066.08	Gold Fields	13012.00	12193.00	6.7%	26156.93
Shoprite Limited	18097.00	18462.00	-2.0%	17128.20	Naspers Ltd	259500.00	229087.00	13.3%	215693.03
Sanlam Limited	6384.00	6546.00	-2.5%	32929.34	Reinet Investments	28126.00	24721.00	13.8%	5872.01

## 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	148700.00	148700.00	0.0%	10.196.35

\*Market closed on 2/9

Email: [research@fsdhgroup.com](mailto:research@fsdhgroup.com) • [www.fsdhgroup.com](http://www.fsdhgroup.com)

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