

Daily Market Report

6 September 2021

JSE

JSE All-Share Index decreased by 0.42% to close at 66,371.88 points on Friday, as the Industrial and Financial sectors recorded losses.

BRVM

BRVM Composite Index closed at 176.48 points, down by 0.16% on Friday with Palm Côte d'Ivoire and CFAO Motors Côte d'Ivoire being the top losers.

NSE

NSE All-Share inched up by 0.02% to close at 39261.01 points on Friday, as the Consumer goods and Industrial sectors recorded gains.

EGX

EGX 30 Index dropped by 1.82% and closed at 11,095.89 points on Sunday, as the market lost LE 17 billion of market cap, amid Arab and foreign selling.

ESG

Casablanca ESG 10 Index closed at 958.05 points on Friday, as it rose by 0.38%.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 0.42%

BRVM Bourse Régionale des Valeurs Mobilières ▼ 0.16%

NSE Nigerian Stock Exchange ▲ 0.02%

EGX Egyptian Stock Exchange ▼ 1.82%

ESG Casablanca Stock Exchange ▲ 0.38%

African Markets

Nigeria: NSE 30 Index increased by 0.14% and closed at 1,620.59 points on Friday. Flour Mills and Lafarge Africa were the top gainers.

Egypt: EGX 30 Index dropped by 1.82% and closed at 11,095.89 points on Sunday, as the market lost LE 17 billion of market cap, amid Arab and foreign selling.

Kenya: NSE 20 Index increased marginally by 0.05% and closed at 2,025.37 points on Friday. WPP Scangroup and Kengen were the top gainers.

South Africa: JSE Top 40 Index decreased by 0.42% to close at 60,106.72 points on Friday, as the Industrial and Financial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.4

INTERBANK RATES

OBB	13.00 ▲
Overnight	13.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.21% to close at 7,636.88 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index remained unchanged at 404.38 points.

Vietnam: VN-30 Index was closed on Friday on account of National Day.

Saudi Arabia: Tadawul All Share Index increased by 0.14% to close at 11,335.92 points on Sunday, as gains in the Building & Construction, Media & Publishing and Telecoms & IT sectors led shares higher. MSCI Tadawul 30 Index was up by 0.20% to close at 1,532.86 points.

India: Nifty 50 market increased by 0.52% to close at 17,323.60 points on Fridays, as gains in the Oil & Gas, Metals and Public Sector Undertakings sectors propelled shares higher. MSCI Nifty 50 Index rose by 0.64% to close at 2,027.81 points.

News

Nigeria:

Nigeria records N1.87tr trade deficit in Q2 2021
Govt plans to cut gas price for power producers
AfCFTA: Dangote Group Projects \$12 billion Annual Revenue

Kenya:

PMI Index for Kenya Picks Up in August
Loan interest charges rise to 16-month high
Public varsities' debt hits Sh57bn

Abu Dhabi:

UAE seeks to draw \$150 billion foreign investment in nine years
Non-oil private sector economy in the UAE posts solid improvement
Mubadala-backed EGA taps banks for IPO at \$15bn value

Saudi Arabia:

Saudi Arabia lowers light crude prices to Asia; US, Europe prices steady
Saudi Telecom's tech unit aims to raise up to \$960mln in IPO
Saudi non-oil sector expansion in August was slowest in five months

Egypt:

Egypt's PMI records 49.8 in August
ELSEWEDY ELECTRIC's subsidiary signs \$16.7M contract in Ghana
Egypt's central bank issues LE 11.5B in T-bills Sunday

South Africa:

South African business activity stabilised in August after unrest - PMI
Eskom wins R1.3 bn summary judgment against Emfuleni local municipality
Private sector credit extension turns positive in July

India:

ICICI Bank gets Iradi nod to cut stake in non-life arm to 30%
33 companies set to make cut for Rs 12k crore telecom incentives
Indiabulls Housing Fin to raise Rs 1,000cr through NCDs

Vietnam:

Viet Nam's steel sales increase due to exports
Ports see increase in goods handling despite COVID-19
Agricultural exports set to reach 50 billion USD by 2025

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,636.88	-0.2%	-0.2%	-0.6%	51.4%	AED/USD	3.67	0.0%	0.0%
Egypt	11,095.89	-1.8%	-1.8%	-0.4%	2.3%	EGP/USD	15.71	-0.1%	-0.2%
India	17,323.60	0.5%	0.0%	1.1%	23.9%	INR/USD	73.02	-0.1%	-0.1%
Kenya	2,025.37	0.05%	0.0%	0.2%	8.4%	KES/USD	110.00	0.0%	0.7%
Nigeria	1,620.59	0.1%	0.0%	0.2%	-1.2%	NGN/USD	412.00	0.0%	4.4%
Saudi Arabia	11,335.92	0.1%	0.1%	0.1%	30.5%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,106.72	-0.4%	0.0%	-1.5%	10.5%	ZAR/USD	14.27	-0.8%	-2.9%
Vietnam	1,426.94	0.0%	0.0%	-0.1%	33.3%	VND/USD	22,765.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	662.08	0.2%	0.0%	0.8%	15.8%	Brent Crude (\$)	72.04	-1.1%	39.1%
MSCI Frontier 100	1,495.11	0.2%	0.0%	0.8%	18.9%	Gold (\$)	1,833.70	1.2%	-3.2%
MSCI Emerging	1,315.91	0.3%	0.0%	0.6%	1.9%	Copper (\$)	9,431.00	0.6%	21.4%
MSCI World (USD)	3,163.99	0.1%	0.0%	0.7%	17.6%	Coffee (\$)	169.38	-0.6%	42.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transnational Corporation	0.94	5.6%	4.4%	18.69	Stanbic IBTC	39.75	-3.0%	-9.8%	87.56
Flour Mills	30.00	4.0%	15.4%	216.75	Fidelity	2.35	-2.1%	-6.7%	26.97
Lafarge Africa	22.40	1.8%	6.4%	14.24	FCMB	2.95	-1.7%	-11.4%	16.60
UBA	7.75	0.6%	-10.4%	56.95	Axamansard	0.88	-1.1%	-16.2%	0.56
Zenith	24.10	0.2%	-2.8%	169.33	Access	9.20	-0.5%	8.9%	170.48
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%	2.13	UBN	5.00	4.65	7.5%	5.31
Transcorp Hotels	5.17	5.17	0.0%	0.12	Cap	19.50	15.25	27.9%	11.01
Total	199.20	199.20	0.0%	0.84	Unilever	13.50	10.50	28.6%	5.34
Seplat Petroleum	759.70	759.70	0.0%	140.80	Ecobank	5.20	3.90	33.3%	0.84
Okomu Oil	110.00	110.00	0.0%	21.08	Sterling	1.51	1.13	33.6%	2.55

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Zee Store Prjsc	43.60	15.0%	315.2%	12.81	RAK Co. for White Cement & Construction	0.92	-9.8%	8.4%	0.09
Al Qudra Holding	3.33	14.8%	202.7%	18.93	Palms Sports	15.54	-9.1%	17.7%	14.16
Ras Al Khaimah Poultry	2.12	14.6%	46.2%	0.06	Umm Al Qaiwain General Investment Co	0.85	-7.6%	-5.6%	0.01
Sharjah Group Co.	1.70	14.1%	100.0%	0.00	Fujairah Cement Industries	0.51	-7.1%	-61.4%	0.00
National Bank of Ras Al Khaimah	4.00	3.9%	2.6%	0.21	National Bank of Umm Al Qaiwain	1.50	-6.3%	-25.0%	0.08
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£)
Cairo For Investment And Real Estate Development	12.52	0.2%	-12.1%	0.19	Egyptian for Tourism Resorts	2.23	-11.9%	57.0%	31.77
					Orascom Development	4.80	-5.7%	-2.0%	4.74
					Pioneers Holding	5.91	-4.5%	47.0%	37.45
					Heliopolis Housing	5.58	-4.5%	-8.5%	10.36
					MM Group For Industry And International Trade	7.61	-4.2%	-2.9%	13.84
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	14.61	14.61	0.0%	1.30	Commercial International Bank	46.92	46.92	0.0%	7.91
Sidi Kerir Petrochemicals	10.20	10.20	0.0%	12.32	GB AUTO	4.10	4.10	0.0%	6.45
Pioneers Holding	5.91	5.91	0.0%	37.45	Medinet Nasr Housing	2.99	2.99	0.0%	24.96
Oriental Weavers	8.49	8.49	0.0%	2.57	Palm Hills Development	1.96	1.96	0.0%	4.06
MM Group For Industry And International Trade	7.61	7.61	0.0%	13.84	T M G Holding	7.30	7.30	0.0%	23.76

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Reliance Industries	2389.65	4.2%	20.4%	33345.342	HDFC Life Insurance Company	734.00	-3.3%	8.5%	11496.17
ONGC	123.40	4.0%	32.6%	2598.24	Cipla	941.00	-1.5%	14.8%	2938.91
Coal India	146.60	3.5%	8.2%	1842.61	Bharti Airtel	657.70	-1.3%	29.0%	5143.74
Titan Company	2021.00	2.7%	29.0%	3102.65	HUL	2772.00	-1.0%	15.7%	4326.52
Indian Oil	112.95	2.5%	24.2%	1715.87	HDFC	2755.50	-0.8%	7.7%	5283.43
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	2021.00	2024.40	-0.2%	3102.65	Hero Motocorp	2799.00	2636.00	6.2%	2739.81
Reliance Industries	2389.65	2395.00	-0.2%	33345.34	Maruti Suzuki India	6869.00	6270.15	9.6%	8226.82
Asian Paints	3333.15	3344.95	-0.4%	2763.80	Dr Reddys Lab	4899.95	4135.00	18.5%	2107.16
Wipro	654.50	657.00	-0.4%	2467.58	Britannia Inds.	4112.00	3317.30	24.0%	1752.86
Britannia Inds.	4112.00	4134.70	-0.5%	1752.86	ITC	210.45	163.35	28.8%	2154.20

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	4.63	6.9%	-22.8%	7.36	Equity Group Holdings Plc	49.90	-3.1%	36.5%	14.31
Kengen Limited	4.73	2.8%	0.4%	0.36	NCBA Group Plc	27.20	-2.7%	1.7%	6.64
Nairobi Securities Exchange Plc	9.76	1.0%	19.6%	0.02	Kenya Power & Lighting Limited	1.36	-1.4%	-20.5%	16.18
Kenya Reinsurance Corporation Ltd	2.50	0.8%	7.8%	19.06	KCB Group Plc	46.80	-0.7%	22.8%	52.86
Absa Bank Kenya	10.55	0.5%	9.2%	1.00	Safaricom Plc	42.15	-0.7%	23.1%	99.50
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)
The Cooperative Bank of Kenya Ltd	13.40	14.05	-4.6%	1.28	Standard Chartered Bank Kenya Ltd	136.25	127.00	7.3%	4.84
Stanbic Holdings	94.00	99.00	-5.1%	0.00	Diamond Trust Bank Limited	65.00	57.50	13.0%	0.90
Absa Bank Kenya	10.55	11.15	-5.4%	1.00	Total Kenya Ltd	25.15	21.50	17.0%	0.06
Nation Media Group	25.00	26.50	-5.7%	0.92	Kenya Power & Lighting Limited	1.36	1.16	17.2%	16.18
NCBA Group Plc	27.20	29.00	-6.2%	6.64	East African Breweries Limited	175.50	148.00	18.6%	87.87

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Ash-Sharqiyah Development	109.80	9.4%	15.9%	297.59	Baazeem Trading	133.00	-2.8%	47.5%	101.27
The National Company for Glass Industries	44.80	6.7%	63.8%	525.22	Leejam Sports Co.	92.00	-2.3%	19.0%	19.67
Batic Investments and Logistics Co.	44.00	6.7%	26.1%	196.50	Saudi Arabian Cooperative Insurance Co.	22.28	-2.1%	8.2%	20.37
Etiihad Atheeb Telecommunication Co.	33.95	5.8%	207.0%	106.08	Bupa Arabia for Cooperative Insurance Co.	160.00	-1.8%	30.9%	14.83
Thob Al Aseel Co.	90.30	4.3%	15.8%	83.71	Malath Cooperative Insurance Co.	32.45	-1.8%	34.8%	41.59
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	67.10	67.10	0.0%	18.39	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.10	61.10	0.0%	127.06	BinDawood Holding Co.	108.00	105.60	2.3%	7.70
Zamil Industrial Investment Co.	38.55	38.55	0.0%	78.12	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	49.60	49.60	0.0%	14.39	Savola Group	39.95	36.60	9.2%	14.48
United Electronics Co.	142.40	142.40	0.0%	14.70	Saudi Airlines Catering Co.	83.30	70.50	18.2%	43.37

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Anglo American Platinum	157005.00	3.8%	15.5%	20112.18	Investec Ltd	5789.00	-3.0%	53.8%	5756.25
Gold Fields	13465.00	3.5%	-2.1%	26475.58	Redefine Properties	432.00	-2.7%	29.7%	2218.90
Northam Platinum	19048.00	2.8%	-9.1%	19851.22	Investec Plc	5832.00	-2.6%	59.2%	4897.36
Anglogold Ashanti	24609.00	2.8%	-28.2%	38516.31	Aspen Phmc.R.Hdg.	19603.00	-1.9%	56.4%	12386.92
Impala Platinum	20796.00	1.8%	3.0%	47697.08	Old Mutual Limited	1580.00	-1.8%	32.9%	27255.22
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)
Shoprite Limited	18259.00	18462.00	-1.1%	19635.98	Brit.Amer.Tobacco	53556.00	50757.00	5.5%	18466.91
Clicks Group	30166.00	30774.00	-2.0%	18620.05	Anglogold Ashanti	24609.00	22600.00	8.9%	38516.31
RMB Holdings Ltd	147.00	151.00	-2.6%	77.03	Gold Fields	13465.00	12193.00	10.4%	26475.58
Firstrand Ltd	6168.00	6354.00	-2.9%	63959.86	Naspers Ltd	257000.00	229087.00	12.2%	157229.26
Sanlam Limited	6348.00	6546.00	-3.0%	17208.25	Reinet Investments	27860.00	24721.00	12.7%	5610.61

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 & Invest.	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 3/9

Email: research@fsdhgroup.com • www.fsdhgroup.com

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