

# Daily Market Report

## 8 September 2021

### JSE

JSE All-Share Index increased by 0.39% to close at 66,514.94 points on Tuesday, as the Resources and Industrial sectors recorded gains.

### BRVM

BRVM Composite Index closed at 176.31 points, up by 0.19% on Tuesday with Nsia Banque Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share slipped by 0.004% to close at 39,251.29 points on Tuesday, as the Insurance and Banking sectors recorded losses.

### EGX

EGX 30 Index increased by 0.23% and closed at 11,089.80 points on Tuesday, as the market gained LE 5.76 billion of market cap, amid Arab buying.

### ESG

Casablanca ESG 10 Index closed at 957.13 points on Tuesday, as it rose by 0.47%.

### African Markets

**Nigeria:** NSE 30 Index decreased marginally by 0.03% and closed at 1,618.75 points on Tuesday. Ecobank and FCMB were the top losers.

**Egypt:** EGX 30 Index increased by 0.23% and closed at 11,089.80 points on Tuesday, as the market gained LE 5.76 billion of market cap, amid Arab buying.

**Kenya:** NSE 20 Index increased by 0.71% and closed at 2,053.00 points on Tuesday. WPP Scangroup and Kenya Power & Lighting were the top gainers.

**South Africa:** JSE Top 40 Index increased by 0.51% to close at 60,340.77 points on Tuesday, as the Resources and Industrial sectors recorded gains.

### Capital Markets

#### JSE

Johannesburg Stock Exchange

▲ 0.39%

#### BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.19%

#### NSE

Nigerian Stock Exchange

▼ 0.004%

#### EGX

Egyptian Stock Exchange

▲ 0.23%

#### ESG

Casablanca Stock Exchange

▲ 0.47%

### Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.42

### INTERBANK RATES

OBB	7.00 ▼
Overnight	7.25 ▼

### Other Emerging Markets

**Abu Dhabi:** ADX General increased by 1.18% to close at 7718.34 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index rose by 1.19% to close at 408.93 points.

**Vietnam:** VN-30 Index increased by 0.18% to close at 1,444.10 points on Tuesday, as the blue-chip companies recorded gains. MSCI Vietnam declined by 0.70% to close at 1,019.42 points.

**Saudi Arabia:** Tadawul All Share Index inched up by 0.06% to close at 11,414.34 points on Tuesday, as gains in the Cement, Building & Construction and Real Estate Development sectors led shares higher. MSCI Tadawul 30 Index increased marginally by 0.06% to close at 1,544.08 points.

**India:** Nifty 50 market decreased marginally by 0.09% to close at 17,362.10 points on Tuesday, as losses in the Real Estate, IT and Oil & Gas sectors pushed shares lower. MSCI Nifty 50 Index was down by 0.20% to close at 2,030.67 points.

### News

#### Nigeria:

CBN, SEC Fines Access Bank, Stanbic IBTC Holdings N423.15m In H1  
FG moves to boost trade relations with Gulf countries  
10 banks rake in N266bn from account maintenance, e-banking fees

#### Kenya:

Current account steady despite higher import bill on remittance growth  
NSE records first net foreign investor inflows since Jan  
Listed banks' tax bill increases 58pc after removal of cushions

#### Abu Dhabi:

Etisalat secures approvals to raise foreign ownership limit to 49%  
ADQ plans to list Abu Dhabi Ports on Abu Dhabi Securities Exchange  
Dubai's Aramex splits business; announces key appointments

#### Saudi Arabia:

Aramco signs multiple deals to expand industrial investment program  
Saudi Arabia's PIF hires 5 banks for ESG panel on green finance push  
Gulf Insurance completes acquisition of AXA in Gulf

#### Egypt:

ElSewedy's subsidiary signs 2 contracts worth LE 1.15B with Egyptian Electricity SODIC, CIB sign cooperation protocol for mortgage financing  
Trade exchange bet. Egypt, South Korea records \$1.05B in H1 2021

#### South Africa:

Growthpoint plans new R2bn specialist fund  
Shoprite profit gains as grocery shoppers spend more per visit  
Private equity investment to SA slides since last year

#### India:

SEBI introduces T+1 settlement cycle for stocks on optional basis  
Cabinet likely to take up telecom relief package today; cuts in SUC, licence fee Selloff: Financial bids for Air India by September 15

#### Vietnam:

PetroVietnam posts three-fold rise in pre-tax profits  
Agro-forestry-fisheries sector enjoys trade surplus of US\$3.3 bn in eight months  
MSB allowed to add \$155 million to its capital

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,718.34	1.2%	0.9%	0.4%	53.0%	AED/USD	3.67	0.0%	0.0%
Egypt	11,089.80	0.2%	-1.9%	-0.5%	2.3%	EGP/USD	15.73	0.1%	0.0%
India	17,362.10	-0.1%	0.2%	1.3%	24.2%	INR/USD	73.43	0.4%	0.5%
Kenya	2,053.00	0.7%	1.4%	1.6%	9.9%	KES/USD	110.06	0.0%	0.8%
Nigeria	1,618.75	-0.03%	-0.1%	0.1%	-1.3%	NGN/USD	411.75	0.0%	4.3%
Saudi Arabia	11,414.34	0.1%	0.8%	0.8%	31.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,340.77	0.5%	0.4%	-1.1%	11.0%	ZAR/USD	14.31	0.4%	-2.6%
Vietnam	1,444.10	0.2%	1.2%	1.1%	34.9%	VND/USD	22,759.50	0.0%	-1.4%

## MSCI Emerging Markets

MSCI Frontier	662.73	-0.1%	0.1%	0.9%	15.9%	Brent Crude (\$)	71.69	-0.7%	38.4%
MSCI Frontier 100	1,495.13	-0.2%	0.0%	0.8%	18.9%	Gold (\$)	1,798.50	-1.5%	-5.1%
MSCI Emerging	1,325.65	0.1%	0.7%	1.3%	2.7%	Copper (\$)	9,350.50	-1.1%	20.4%
MSCI World (USD)	3,158.94	-0.3%	-0.2%	0.6%	17.4%	Coffee (\$)	169.54	0.7%	42.2%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	8.10	8.0%	94.2%	73.08	Ecobank	5.25	-4.5%	-12.5%	5.18
International Breweries	5.00	7.5%	-16.0%	2.65	UACN	10.55	-4.1%	45.5%	27.72
Julius Berger	27.00	3.8%	51.7%	11.65	Transcorp Hotels	5.00	-3.3%	38.9%	0.77
Sterling	1.56	3.3%	-23.5%	4.39	Wema	0.82	-2.4%	18.8%	10.48
Access	9.40	1.1%	11.2%	711.91	FCMB	2.90	-1.7%	-12.9%	5.91
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	10.55	10.55	0.0%	27.72	UBN	5.00	4.65	7.5%	2.51
Transcorp Hotels	5.00	5.00	0.0%	0.77	Cap	19.50	15.25	27.9%	0.30
Total	199.20	199.20	0.0%	60.84	Unilever	13.50	10.50	28.6%	4.29
Seplat Petroleum	759.70	759.70	0.0%	199.50	Ecobank	5.25	3.90	34.6%	5.18
Okomu Oil	110.00	110.00	0.0%	63.73	Cadbury	8.50	6.30	34.9%	1.69

### 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.	2.01	14.9%	136.5%	1.03	Abu Dhabi National for Building Materials	0.30	-6.3%	15.8%	0.01
Fujairah Cement Industries	0.56	9.6%	-57.7%	1.07	Esg Emirates Stallions Group	7.30	-4.3%	75.5%	2.63
Emirates Telecom	24.16	6.7%	43.0%	142.49	Easylease motorcycle rentals	55.00	-3.3%	212.5%	3.28
Al Qudra Holding	3.33	4.1%	202.7%	3.03	Finance House	1.59	-1.9%	-16.3%	0.02
Methaq Takaful Ins.	0.86	3.5%	-0.7%	0.92	Sharjah Islamic Bank	1.74	-1.1%	31.8%	8.64
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	Gulf Medical Projects	1.75	1.75	0.0%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	National Bank of Fujairah	4.98	4.98	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	Sharjah Insurance	1.30	1.30	0.0%	0.00
Wahat Al Zaweya Holding PrJSC	2.94	2.94	0.0%	0.00	Umm Al Qaiwain General Inv.	0.85	0.85	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£)
Speed Medical	1.90	9.8%	16.6%	65.81	Credit Agricole Egypt	27.37	-2.2%	-5.7%	3.81
Egyptian for Tourism Resorts	2.24	5.7%	57.7%	19.11	Ezz Steel	14.43	-1.5%	34.5%	7.90
MM Group For Industry AndInternational Trade	7.74	4.6%	-1.3%	16.42	ELSWEDY ELECTRIC	8.31	-1.1%	-15.3%	12.46
Heliopolis Housing	5.68	3.5%	-6.9%	22.07	Orascom Development Egypt	4.70	-0.8%	-4.1%	1.86
GB AUTO	4.08	2.8%	22.9%	3.92	T M G Holding	7.33	-0.8%	11.6%	2.02
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	14.55	14.55	0.0%	4.06	Commercial International Bank(Egypt)	46.78	46.78	0.0%	34.11
Sidi Kerir Petrochemicals	9.99	9.99	0.0%	6.70	GB AUTO	4.08	4.08	0.0%	3.92
Pioneers Holding	5.71	5.71	0.0%	15.33	Medinet Nasr Housing	2.97	2.97	0.0%	17.13
Oriental Weavers	8.85	8.85	0.0%	9.70	Palm Hills Development Company	1.95	1.95	0.0%	1.62
MM Group For Industry AndInternational Trade	7.74	7.74	0.0%	16.42	T M G Holding	7.33	7.33	0.0%	2.02

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Bharti Airtel	671.75	2.6%	31.8%	18499.780	Sun Pharm.Industries	767.30	-2.2%	29.5%	2979.49
HDFC	2833.20	2.5%	10.7%	11466.30	Hindalco Industries	461.00	-1.8%	91.6%	2647.47
Grasim Industries	1555.10	1.6%	67.6%	1782.15	Axis Bank	787.60	-1.7%	26.9%	5463.47
ITC	211.85	1.2%	1.4%	7964.65	Wipro	675.25	-1.6%	74.8%	4350.77
Indusind Bank	1001.85	1.0%	11.9%	5483.63	Tech Mahindra	1437.85	-1.6%	47.7%	2811.14
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Ultratech Cement	8030.00	8060.00	-0.4%	1923.72	Hero Motocorp	2793.00	2636.00	6.0%	873.65
Nestle India Limited	20310.00	20392.70	-0.4%	694.37	Maruti Suzuki India	6878.00	6270.15	9.7%	5117.10
Titan Company	2030.85	2039.90	-0.4%	1569.27	Dr Reddys Lab	4887.25	4135.00	18.2%	2057.57
Divi's Laboratories Limited	5209.70	5271.65	-1.2%	1487.21	Britannia Inds.	4092.00	3317.30	23.4%	1063.87
Bharti Airtel	671.75	680.50	-1.3%	18499.78	ITC	211.85	163.35	29.7%	7964.65

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh )	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	5.56	9.9%	-7.3%	1.53	Nairobi Securities Exchange Plc	9.74	-2.4%	19.4%	0.26
Kenya Power & Lighting Limited	1.55	4.0%	-9.4%	1.44	Safaricom Plc	41.60	-1.3%	21.5%	226.15
KenGen Limited	4.86	3.6%	3.2%	5.99	Absa Bank Kenya	10.30	-1.0%	6.6%	1.86
East African Breweries Limited	175.50	2.5%	13.8%	1.16	Diamond Trust Bank Limited	64.50	-0.8%	-14.0%	0.43
Centum Investment Company Plc	16.85	0.9%	5.0%	2.61	The Cooperative Bank of Kenya Ltd	13.45	-0.7%	7.6%	1.29
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	13.45	14.05	-4.3%	1.29	Standard Chartered Bank Kenya Ltd	135.25	127.00	6.5%	0.83
Nation Media Group	25.00	26.50	-5.7%	0.63	Diamond Trust Bank Limited	64.50	57.50	12.2%	0.43
NCBA Group Plc	27.10	29.00	-6.6%	0.82	Total Kenya Ltd	25.15	21.50	17.0%	0.01
British American Tobacco Kenya Ltd	463.75	500.00	-7.3%	0.28	East African Breweries Limited	175.50	148.00	18.6%	1.16
Absa Bank Kenya	10.30	11.15	-7.6%	1.86	Centum Investment Company Plc	16.85	14.05	19.9%	2.61

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Batic Investments and Logistics Co.	44.90	4.3%	28.7%	207.22	Saudi Arabian Fertilizer Co.	388.00	-3.5%	381.4%	196.58
Tabuk Agricultural Development Co.	39.90	3.6%	23.1%	231.23	Al Sagr Coop Insurance Co.	16.34	-3.4%	4.9%	28.37
Saudi Arabian Mining Co.	75.80	3.3%	87.2%	98.21	The National Co for Glass Industries	43.15	-3.4%	57.8%	197.65
AXA Cooperative Insurance Co.	40.20	3.2%	12.6%	37.38	Tihama Advertising and Public Relations Co.	53.00	-2.4%	2.3%	40.34
Wafrah for Industry and Development Co.	162.20	3.2%	5.3%	137.59	AlAhli REIT Fund 1	13.66	-2.3%	53.1%	5.65
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	68.10	68.10	0.0%	64.97	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.50	61.50	0.0%	219.16	BinDawood Holding Co.	107.80	105.60	2.1%	8.39
Zamil Industrial Investment Co.	40.70	40.70	0.0%	195.82	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	49.00	49.00	0.0%	44.91	Savola Group	40.05	36.60	9.4%	12.47
United Electronics Co.	139.80	139.80	0.0%	16.47	Saudi Airlines Catering Co.	83.70	70.50	18.7%	21.29

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Shoprite Limited	18340.00	2.6%	31.0%	40765.00	Gold Fields	12952.00	-2.4%	-5.9%	44070.54
Capitec Bank	190021.00	2.5%	32.6%	45083.05	Old Mutual Limited	1543.00	-2.0%	29.8%	19504.89
Prosus	136000.00	2.1%	-15.3%	167880.30	Discovery Ltd	11952.00	-1.7%	-22.2%	20860.16
Naspers Ltd	268467.00	1.8%	-11.1%	201786.24	Bidvest Group	19542.00	-1.7%	24.5%	16343.19
Anglo American Platinum	152600.00	1.5%	12.2%	21385.97	Aspen Phmc.Hdg.	19801.00	-1.5%	57.9%	14083.52
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	18340.00	18669.00	-1.8%	40765.00	Anglogold Ashanti	23269.00	22600.00	3.0%	24615.44
Capitec Bank	190021.00	193695.00	-1.9%	45083.05	Brit.Amer.Tobacco	53677.00	50757.00	5.8%	21494.26
Aspen Phmc.Hdg.	19801.00	20272.00	-2.3%	14083.52	Gold Fields	12952.00	12193.00	6.2%	44070.54
Clicks Group	29890.00	30774.00	-2.9%	14197.66	Reinet Investments	27301.00	24721.00	10.4%	4988.30
Woolworths Hdg.	6245.00	6449.00	-3.2%	24773.86	Discovery Ltd	11952.00	10650.00	12.2%	20860.16

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Tien Phong Commercial Joint Stock Bank	36400.00	4.6%	15.6%	406014.76	Phat Dat Real Estate Devpt Corp	83000.00	-3.5%	98.0%	264003.02
Vietnam Prosperity	63500.00	3.9%	-49.2%	657603.71	Vincom Retail	27200.00	-3.2%	-74.8%	92742.58
Vietnam JSC Bank	32650.00	1.9%	22.0%	352939.29	PetroVietnam Power Corp	12050.00	-2.8%	-11.4%	182353.19
Bank for Inv. and Devp	39700.00	1.5%	-17.1%	67903.00	Vinamilk	86300.00	-2.3%	-20.2%	227670.93
Techcombank	49650.00	1.4%	193.8%	576608.10	BaoViet Holdings	55300.00	-2.0%	-16.2%	81359.71
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	63500.00	63500.00	0.0%	657603.71	Military Commercial Bank	28600.00	28600.00	0.0%	583892.29
Vietjet Aviation	124600.00	124600.00	0.0%	102445.93	Vietnam National Petroleum Group	50400.00	50400.00	0.0%	61248.14
Vingroup JSC	93900.00	93900.00	0.0%	215212.68	PetroVietnam Power Corp	12050.00	12050.00	0.0%	182353.19
Vinhomes	109600.00	109600.00	0.0%	1277504.19	Saigon Beer Alcohol Beverage Corp.	148700.00	148700.00	0.0%	19320.81
Techcombank	49650.00	49650.00	0.0%	576608.10	Sai Gon Thuong Tin Commercial	27900.00	27900.00	0.0%	385633.76

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