

Daily Market Report

13 September 2021

JSE

JSE All-Share Index increased by 0.19% to close at 64,296.06 points on Friday, as the Resources and Industrial sectors recorded gains.

BRVM

BRVM Composite Index closed at 177.85 points, up by 0.16% on Friday with Solibra Côte d'Ivoire and Bernabe Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased by 0.71% to close at 38,921.78 points on Friday, as the Insurance and Industrial sectors recorded loss.

EGX

EGX 30 Index decreased by 0.17% and closed at 11,036.93 points on Sunday, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 968.39 points on Friday, as it fell 0.96%.

Capital Markets

| | |
|--|---------|
| JSE Johannesburg Stock Exchange | ▲ 0.19% |
| BRVM Bourse Régionale des Valeurs Mobilières | ▲ 0.16% |
| NSE Nigerian Stock Exchange | ▼ 0.71% |
| EGX Egyptian Stock Exchange | ▼ 0.17% |
| ESG Casablanca Stock Exchange | ▼ 0.96% |

African Markets

Nigeria: NSE 30 Index slipped by 0.05% and closed at 1,615.69 points on Friday. Ecobank and UBA were the top losers.

Egypt: EGX 30 Index decreased by 0.17% and closed at 11,036.93 points on Sunday, amid Egyptian selling.

Kenya: NSE 20 Index inched up by 0.06% and closed at 2,063.44 points on Friday. Equity Group Holdings and WPP Scangroup were the top gainers.

South Africa: JSE Top 40 Index increased by 0.27% to close at 58,175.75 points on Friday, as the Resources and Industrial sectors recorded gains.

Nigeria Key Indicators

| | Current |
|---------------|----------|
| Inflation | 17.38% |
| Exchange Rate | ₦ 410.48 |

INTERBANK RATES

| | |
|-----------|---------|
| OBB | 14.00 ▲ |
| Overnight | 14.50 ▲ |

Other Emerging Markets

Abu Dhabi: ADX General decreased by 0.52% to close at 7,819.66 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index remained unchanged at 418.77 points.

Vietnam: VN-30 Index increased marginally by 0.07% to close at 1,448.33 points on Friday, as the blue-chip companies recorded gains. MSCI Vietnam inched up by 0.04% to close at 1017.45 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.66% to close at 11,342.85 points on Sunday, as losses in the Building & Construction, Hotels & Tourism and Industrial Investment sectors led shares lower. MSCI Tadawul 30 Index fell 0.62% to close at 1,537.51 points.

India: Nifty 50 market was closed on Friday on the account of Ganesh Chaturthi.

News

Nigeria:

Fidelity Bank Reports 72.4% Increase in PBT To N20.6bn
Lagos Law Wrests Tax Control From Nigeria Federal Government
FG Borrowing Surges as T-bills Rates Peaks at 7.2%

Kenya:

CBK raises KSh 17.4 Billion at the Weekly T-Bills Auction
Treasury in fresh bid for 20pc tax rate on betting
Safaricom, NCBP in deal to boost farmers' access to information

Abu Dhabi:

UAE sets 10% Emiratization quota for private companies
Etisalat, Emirates Steel & Taqa join national programme to boost local mfg
Aramex confirms acquisition talks with MNG Kargo

Saudi Arabia:

Saudi's Sidra Capital acquires UK office building in \$26m deal
United Cooperative reduces accumulated losses to 28% of capital
Saudi Arabia's Savola Q2 net profit tops \$53m

Egypt:

Egypt's trade deficit decreases by 27.8 % in June
Treasury disburses EGP 115 bn in green incentives for vehicle replacement initiative
Egypt sees 1bn electronic banking transactions worth over \$178.2bn

South Africa:

Current accounts post record surplus as manufacturing takes a hit
Aspen's shares leap on two material unsolicited offers for API business
Sanlam business growth well up, but earnings hurt by R10bn mortality claims

India:

Factory output up 11.5% in July on low base
Forex reserves rise \$8.895 billion to record high of \$ 642.453 billion
Income Tax refunds worth Rs 70,120 crore issued between April 1 and Sept 6

Vietnam:

Reference exchange rate down 5 VND at week's beginning
Quảng Ninh proposes VNĐ2.2 trillion general port in Q4 2021
Oil company pays 278 million USD to state budget

Indices and FX Data

| Indices | Last Trade | 1d% | WTD% | MTD% | YTD% | Currency/Commodity | Last Trade | 1d% | YTD% |
|--------------|------------|-------|-------|-------|-------|--------------------|------------|------|-------|
| Abu Dhabi | 7,819.66 | -0.5% | -0.5% | 1.8% | 55.0% | AED/USD | 3.67 | 0.0% | 0.0% |
| Egypt | 11,036.93 | -0.2% | -0.2% | -1.0% | 1.8% | EGP/USD | 15.71 | 0.0% | -0.1% |
| India | 17,369.25 | 0.0% | 0.0% | 1.4% | 24.2% | INR/USD | 73.50 | 0.0% | 0.6% |
| Kenya | 2,063.44 | 0.1% | 0.0% | 2.1% | 10.4% | KES/USD | 109.90 | 0.0% | 0.6% |
| Nigeria | 1,615.69 | -0.1% | 0.0% | -0.1% | -1.5% | NGN/USD | 411.75 | 0.0% | 4.3% |
| Saudi Arabia | 11,342.85 | -0.7% | -0.7% | 0.2% | 30.5% | SAR/USD | 3.75 | 0.0% | 0.0% |
| South Africa | 58,175.75 | 0.3% | 0.0% | -4.7% | 7.0% | ZAR/USD | 14.15 | 0.2% | -3.7% |
| Vietnam | 1,448.33 | 0.1% | 0.0% | 1.4% | 35.3% | VND/USD | 22,758.00 | 0.0% | -1.4% |

MSCI Emerging Markets

| | | | | | | | | | |
|-------------------|----------|-------|------|-------|-------|------------------|----------|-------|-------|
| MSCI Frontier | 663.67 | -0.1% | 0.0% | 1.0% | 16.1% | Brent Crude (\$) | 72.92 | 2.1% | 40.8% |
| MSCI Frontier 100 | 1,503.05 | -0.1% | 0.0% | 1.3% | 19.5% | Gold (\$) | 1,792.10 | -0.4% | -5.4% |
| MSCI Emerging | 1,308.94 | 0.7% | 0.0% | 0.0% | 1.4% | Copper (\$) | 9,694.50 | 3.3% | 24.8% |
| MSCI World (USD) | 3,122.07 | -0.4% | 0.0% | -0.6% | 16.1% | Coffee (\$) | 166.54 | -0.4% | 39.7% |

STOCKS

Nigeria

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₦) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₦) |
|-----------------------|------------|--------|----------|--------------|----------------------|------------|-------|----------|------------|
| Custodian | 6.70 | 2.3% | 14.5% | 0.72 | Cadbury | 8.00 | -5.9% | -11.1% | 2.37 |
| FCMB | 3.00 | 1.7% | -9.9% | 1.70 | Airtel Africa | 715.00 | -4.7% | -16.1% | 643.82 |
| Zenith | 24.00 | 0.8% | -3.2% | 241.56 | Ecobank | 5.00 | -3.8% | -16.7% | 21.96 |
| Flour Mills | 28.95 | 0.7% | 11.3% | 43.11 | Wema | 0.77 | -3.8% | 11.6% | 1.83 |
| FBNH | 7.55 | 0.7% | 5.6% | 47.71 | UBA | 7.60 | -3.2% | -12.1% | 116.73 |
| Stocks near 52 w high | Last Price | 52w H | % Change | Value (mn ₦) | Stocks near 52 w Low | Last Price | 52w L | % Change | Val (mn ₦) |
| Transcorp Hotels | 5.00 | 5.00 | 0.0% | 0.05 | UBN | 5.00 | 4.65 | 7.5% | 2.20 |
| Total | 199.20 | 199.20 | 0.0% | 4.61 | Cadbury | 8.00 | 6.30 | 27.0% | 2.37 |
| Seplat Petroleum | 759.70 | 759.70 | 0.0% | 62.80 | Ecobank | 5.00 | 3.90 | 28.2% | 21.96 |
| Okomu Oil | 110.00 | 110.00 | 0.0% | 49.88 | Cap | 19.60 | 15.25 | 28.5% | 5.65 |
| Julius Berger | 27.00 | 27.00 | 0.0% | 1.98 | Unilever | 13.50 | 10.50 | 28.6% | 2.17 |

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. | 2.99 | 15.0% | 251.8% | 0.07 | Reem Investments | 27.00 | -9.8% | 22.7% | 1.10 |
| Gulf Cement | 0.75 | 11.8% | -10.6% | 0.02 | Ras Al Khaimah Cement Investment Co | 3.03 | -7.3% | -10.6% | 9.67 |
| Ras Al Khaimah Poultry | 2.30 | 8.5% | 58.6% | 0.03 | Palms Sports | 14.30 | -7.1% | 8.3% | 8.59 |
| Easylease motorcycle rentals | 55.90 | 3.5% | 217.6% | 4.95 | Sudatel Telecom | 0.37 | -6.3% | -10.1% | 0.04 |
| Sharjah Islamic Bank | 1.75 | 1.2% | 32.6% | 1.46 | Al Seer Marine Supplies & Equipment Co | 16.10 | -4.3% | 7.3% | 46.25 |
| 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 | 1.71 | 0.0% | 0.00 | Insurance House | 0.79 | 0.81 | 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£) |
|---|------------|-------|----------|---------------|---|------------|-------|----------|-------------|
| Raya Holding For Financial Investments | 2.43 | 3.9% | 232.9% | 0.18 | MM Group For Industry And International Trade | 7.48 | -3.0% | -4.6% | 0.79 |
| Misr Fertilizers Production Company - Mopco | 84.00 | 2.4% | 42.9% | 0.45 | Eastern Company | 12.29 | -2.5% | -5.8% | 1.01 |
| Palm Hills Development Company | 1.95 | 1.6% | 43.0% | 30.39 | Cleopatra Hospital Company | 4.54 | -2.2% | -4.6% | 0.55 |
| GB AUTO | 3.93 | 1.6% | 18.4% | 2.14 | Oriental Weavers | 9.10 | -1.9% | 32.8% | 5.39 |
| T M G Holding | 7.48 | 1.5% | 13.9% | 6.65 | Ezz Steel | 14.16 | -1.5% | 32.0% | 2.61 |
| 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 | 14.34 | 14.34 | 0.0% | 1.03 | Commercial International Bank(Egypt) | 45.80 | 45.80 | 0.0% | 4.16 |
| Sidi Kerir Petrochemicals | 9.63 | 9.63 | 0.0% | 3.00 | GB AUTO | 3.93 | 3.93 | 0.0% | 2.14 |
| Pioneers Holding | 5.87 | 5.87 | 0.0% | 16.01 | Medinet Nasr Housing | 2.95 | 2.95 | 0.0% | 3.56 |
| Oriental Weavers | 9.10 | 9.10 | 0.0% | 5.39 | Palm Hills Development Co | 1.95 | 1.95 | 0.0% | 30.39 |
| MM Group For Industry And International Trade | 7.48 | 7.48 | 0.0% | 0.79 | T M G Holding | 7.48 | 7.48 | 0.0% | 6.65 |

India*

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₹) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₹) |
|-----------------------|------------|----------|----------|--------------|-----------------------------|------------|---------|----------|------------|
| ONGC | 122.15 | 2.7% | 31.3% | 3324.691 | SBI Life Insurance | 1174.00 | -3.8% | 29.8% | 11911.40 |
| Bharti Airtel | 685.45 | 2.6% | 34.5% | 13194.85 | HDFC Life Insurance Company | 736.00 | -1.0% | 8.8% | 2125.29 |
| Nestle India Limited | 20350.05 | 2.6% | 10.7% | 2240.98 | Titan Company | 2035.00 | -1.0% | 29.9% | 1331.62 |
| Hindalco Industries | 463.25 | 1.5% | 92.6% | 3193.19 | Ultratech Cement | 7929.95 | -0.8% | 50.0% | 1266.63 |
| Grasim Industries | 1596.00 | 1.2% | 72.0% | 1336.90 | Bajaj Auto | 3699.80 | -0.7% | 7.4% | 1776.77 |
| Stocks near 52 w high | Last Price | 52w H | % Change | Value (mn ₹) | Stocks near 52 w Low | Last Price | 52w L | % Change | Val (mn ₹) |
| Bharti Airtel | 685.45 | 688.20 | -0.4% | 13194.85 | Hero Motocorp | 2799.10 | 2636.00 | 6.2% | 1124.32 |
| HUL | 2805.00 | 2825.00 | -0.7% | 2470.53 | Maruti Suzuki India | 6800.00 | 6270.15 | 8.5% | 3499.02 |
| Nestle India Limited | 20350.05 | 20530.00 | -0.9% | 2240.98 | Dr Reddys Lab | 4912.10 | 4135.00 | 18.8% | 1778.87 |
| Bharat Petroleum | 491.75 | 496.50 | -1.0% | 2226.59 | Britannia Inds. | 4069.00 | 3317.30 | 22.7% | 1205.98 |
| Grasim Industries | 1596.00 | 1614.20 | -1.1% | 1336.90 | ITC | 212.95 | 163.35 | 30.4% | 4049.53 |

*Market closed on 10/9

Kenya

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn KSh) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn KSh) |
|-----------------------------------|------------|-------|----------|-----------------|-----------------------------------|------------|--------|----------|--------------|
| Equity Group Holdings Plc | 51.00 | 2.3% | 39.5% | 132.03 | Kenya Power & Lighting Limited | 1.58 | -2.5% | -7.6% | 1.09 |
| WPP Scangroup Plc | 5.56 | 1.8% | -7.3% | 3.09 | Bamburi Cement Limited | 38.15 | -2.1% | 0.8% | 2.29 |
| Total Kenya Ltd | 25.70 | 1.8% | 7.1% | 0.06 | Stanbic Holdings | 89.25 | -1.4% | 5.0% | 0.13 |
| Absa Bank Kenya | 10.40 | 1.0% | 7.7% | 0.70 | Nairobi Securities Exchange Plc | 9.72 | -0.6% | 19.1% | 0.02 |
| KCB Group Plc | 46.60 | 0.6% | 22.3% | 41.28 | Diamond Trust Bank Limited | 64.00 | -0.4% | -14.7% | 0.24 |
| 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) |
| Nation Media Group | 25.55 | 26.50 | -3.6% | 0.44 | Standard Chartered Bank Kenya Ltd | 135.00 | 127.00 | 6.3% | 2.07 |
| The Cooperative Bank of Kenya Ltd | 13.40 | 14.05 | -4.6% | 2.57 | Diamond Trust Bank Limited | 64.00 | 57.50 | 11.3% | 0.24 |
| NCBA Group Plc | 27.65 | 29.00 | -4.7% | 0.59 | East African Breweries Limited | 175.00 | 148.00 | 18.2% | 22.42 |
| Safaricom Plc | 42.50 | 45.25 | -6.1% | 178.16 | Total Kenya Ltd | 25.70 | 21.50 | 19.5% | 0.06 |
| Total Kenya Ltd | 25.70 | 27.50 | -6.5% | 0.06 | Centum Investment Company Plc | 16.95 | 14.05 | 20.6% | 1.13 |

Saudi Arabia

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn SAR) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn SAR) |
|---|------------|--------|----------|----------------|-------------------------------------|------------|--------|----------|--------------|
| Saudi Arabian Fertilizer Co. | 430.00 | 7.0% | 433.5% | 416.67 | Arriyadh Development Co. | 30.00 | -4.3% | 74.6% | 41.52 |
| Ash-Sharqiyah Development Co. | 116.00 | 6.4% | 22.5% | 357.37 | Al Moammar Info Systems Co. | 170.20 | -2.3% | 76.9% | 40.30 |
| SABIC Agri-Nutrients Co | 140.00 | 5.4% | 73.7% | 91.26 | Abdullah Al Othaim Markets Co. | 114.20 | -2.2% | -7.0% | 16.48 |
| Etihad Atheeb Telecommunication Co. | 34.00 | 3.5% | 207.4% | 61.81 | Nama Chemicals Co. | 45.90 | -2.1% | 37.8% | 6.70 |
| Saudi Airlines Catering Co. | 88.50 | 3.3% | 14.8% | 106.92 | Dallah Healthcare | 72.70 | -2.0% | 50.7% | 9.33 |
| 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 | 66.80 | 66.80 | 0.0% | 48.94 | National Agricultural Marketing Co. | 17.20 | 17.00 | 1.2% | 0.00 |
| The Saudi National Bank | 60.70 | 60.70 | 0.0% | 80.10 | BinDawood Holding Co. | 107.60 | 105.60 | 1.9% | 6.77 |
| Zamil Industrial Investment Co. | 39.65 | 39.65 | 0.0% | 47.07 | Abdullah A. M. Al-Khodari Sons Co. | 5.39 | 5.18 | 4.1% | 0.00 |
| United International Transportation Co. | 48.60 | 48.60 | 0.0% | 23.77 | Savola Group | 39.15 | 36.60 | 7.0% | 9.18 |
| United Electronics Co. | 146.00 | 146.00 | 0.0% | 31.33 | Alkhabeer REIT Fund | 9.62 | 8.11 | 18.6% | 1.91 |

South Africa

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn R) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn R) |
|-----------------------|------------|-----------|----------|--------------|-------------------------|------------|-----------|----------|------------|
| Aspen Phmc.R.Hdg. | 21857.00 | 2.4% | 74.3% | 33205.94 | Multichoice Group | 10200.00 | -3.2% | -23.9% | 10439.28 |
| Anglo American (JSE) | 60119.00 | 2.1% | 26.7% | 53513.67 | Bidvest Group | 18700.00 | -2.9% | 19.1% | 25945.89 |
| Bid Corporation | 30593.00 | 1.8% | 16.3% | 22258.40 | Impala Platinum | 17760.00 | -2.6% | -12.0% | 89513.42 |
| MTN Group | 12442.00 | 1.5% | 106.7% | 63810.78 | Anglo American Platinum | 137496.00 | -1.9% | 1.1% | 55979.43 |
| Sasol Limited | 22175.00 | 1.4% | 65.6% | 33743.85 | Redefine Properties | 425.00 | -1.8% | 27.6% | 1110.66 |
| 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 Phmc.R.Hdg. | 21857.00 | 22187.00 | -1.5% | 33205.94 | Anglogold Ashanti | 21796.00 | 21700.00 | 0.4% | 18912.93 |
| Clicks Group | 30250.00 | 30774.00 | -1.7% | 20702.83 | Gold Fields | 12029.00 | 11939.00 | 0.8% | 20315.24 |
| Capitec Bank | 187842.00 | 193695.00 | -3.0% | 33835.42 | Brit.Amer.Tobacco | 51979.00 | 50757.00 | 2.4% | 25443.04 |
| RMB Holdings Ltd | 145.00 | 151.00 | -4.0% | 698.87 | Naspers Ltd | 239053.00 | 229087.00 | 4.4% | 217158.14 |
| Shoprite Limited | 17916.00 | 18836.00 | -4.9% | 21452.30 | Reinet Investments | 26306.00 | 24721.00 | 6.4% | 7158.91 |

Vietnam

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn đ) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn đ) |
|------------------------------------|------------|-----------|----------|--------------|--|------------|----------|----------|------------|
| Phu Nhuan Jewelry | 94000.00 | 3.9% | 17.2% | 98.094.34 | Ho Chi Minh City Devp | 25900.00 | -1.9% | 9.1% | 67.811.60 |
| Vincom Retail | 28000.00 | 2.0% | -74.0% | 163.349.69 | Vietnam Rubber Group JSC | 39300.00 | -1.6% | 31.2% | 135490.61 |
| BaoViet Holdings | 56000.00 | 2.0% | -15.2% | 51192.68 | Tien Phong Commercial Joint Stock Bank | 37400.00 | -1.1% | 18.7% | 297638.96 |
| Vietnam Prosperity | 64600.00 | 1.9% | -48.3% | 662.595.29 | Hoa Phat Group | 51500.00 | -0.8% | 68.7% | 891.095.46 |
| Saigon Beer Alcohol Beverage Corp. | 151400.00 | 1.8% | -22.4% | 23819.77 | Masan Group Corp | 130000.00 | -0.8% | 47.5% | 93.566.17 |
| 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 | 64600.00 | 64600.00 | 0.0% | 662.595.29 | Military Commercial Bank | 28200.00 | 28200.00 | 0.0% | 239826.44 |
| Vietjet Aviation | 129800.00 | 129800.00 | 0.0% | 119.513.10 | Vietnam National Petroleum Group | 50500.00 | 50500.00 | 0.0% | 35631.52 |
| Vingroup JSC | 91300.00 | 91300.00 | 0.0% | 147636.51 | PetroVietnam Power Corp | 12100.00 | 12100.00 | 0.0% | 95066.20 |
| Vinhomes | 107500.00 | 107500.00 | 0.0% | 1,640.260.12 | Sai Gon Thuong Tin Commercial | 27200.00 | 27200.00 | 0.0% | 292.079.24 |
| Techcombank | 49300.00 | 49300.00 | 0.0% | 356624.57 | Tien Phong Commercial Joint Stock Bank | 37400.00 | 37400.00 | 0.0% | 297638.96 |

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