

# Daily Market Report

## 14 September 2021

### JSE

JSE All-Share Index increased by 0.55% to close at 64,652.32 points on Monday, as the Resources and Financial sectors recorded gains.

### BRVM

BRVM Composite Index closed at 177.70 points, down by 0.08% on Monday with SMB Côte d'Ivoire and Sucrivoire Côte d'Ivoire being the top losers.

### NSE

NSE All-Share slipped by 0.02% to close at 38,915.62 points on Monday, as the Oil and Gas, Insurance and Industrial sectors recorded losses.

### EGX

EGX 30 Index increased by 0.94% and closed at 11,140.22 points on Monday, as the market gained LE 6.7 billion of market cap, amid Arab and foreign buying.

### ESG

Casablanca ESG 10 Index closed at 970.36 points on Monday, as it rose by 0.20%.

## African Markets

**Nigeria:** NSE 30 Index inched up by 0.01% and closed at 1,615.86 points on Monday. Fidelity and International Breweries were the top gainers.

**Egypt:** EGX 30 Index increased by 0.94% and closed at 11,140.22 points on Monday, as the market gained LE 6.7 billion of market cap, amid Arab and foreign buying.

**Kenya:** NSE 20 Index decreased by 0.10% and closed at 2,061.36 points on Monday. Nairobi Securities Exchange and WPP Scangroup were the top losers.

**South Africa:** JSE Top 40 Index increased by 0.55% to close at 58,494.78 points on Monday, as the Resources and Financial sectors recorded gains.

## Capital Markets

**JSE** Johannesburg Stock Exchange ▲ 0.55%

**BRVM** Bourse Régionale des Valeurs Mobilières ▼ 0.08%

**NSE** Nigerian Stock Exchange ▼ 0.02%

**EGX** Egyptian Stock Exchange ▲ 0.94%

**ESG** Casablanca Stock Exchange ▲ 0.20%

## Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.51

## INTERBANK RATES

OBB	14.50 ▲
Overnight	14.75 ▲

## Other Emerging Markets

**Abu Dhabi:** ADX General declined by 0.70% to close at 7,764.69 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index fell 0.94% to close at 414.84 points.

**Vietnam:** VN-30 Index decreased by 0.23% to close at 1,444.99 points on Monday, as the blue-chip companies recorded losses. MSCI Vietnam declined by 0.20% to close at 1,015.41 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.38% to close at 11,386.38 points on Monday, as gains in the Hotels & Tourism, Industrial Investment and Media & Publishing sectors led shares higher. MSCI Tadawul 30 Index increased by 0.32% to close at 1,542.37 points.

**India:** Nifty 50 market decreased marginally by 0.08% to close at 17,355.30 points on Monday, as losses in the Banking, Consumer Durables and Carbon sectors pulled shares lower. MSCI India inched up by 0.05% to close at 2,035.15 points.

## News

### Nigeria:

Non-oil exports: FG suffers N5.8tn revenue shortfall  
Non-performing loans declining but remain above benchmark – CBN  
Dangote refinery partners NCDMB on oil sector research, development

### Kenya:

Bond dollar inflows boost forex reserves by 8.4pc  
Treasury races ahead of domestic borrowing target  
Corporate deals decline amid Covid uncertainty

### Abu Dhabi:

ADNOC Drilling's IPO offer price set at \$0.62/share  
UAE to spend \$6.5bn attracting citizens to private-sector jobs  
UAE Central Bank issues new guidelines on anti-money laundering

### Saudi Arabia:

Saudi economy grows 1.8% in Q2 but non-oil sector loses steam  
APICORP to invest \$1bn on green energy projects in next 2 years  
Saudi HR tech startup Scalars raises \$533,000 in seed round

### Egypt:

Egypt's Financial Regulator lessens minimum required shares to list on EGX  
Misr Capital gets purchase, redemption orders for debt instrument investment fund  
EBRD disburses €25 mn loan to establish first inland dry port in Egypt

### South Africa:

Rand appreciation continues on the back of increased demand from foreigners  
Steinhoff closer to settling R25bn claims after green light by claimants  
Comair sells SLOW Lounge to FirstRand for R250m in business rescue process

### India:

CPI inflation in Aug cools further to 5.30%  
Zee Ent's shareholders call EGM seeking removal of Puneet Goenka from board  
Airtel plans co-branded handsets to take on Jio in move to ringfence 2G subscribers

### Vietnam:

Binh Duong Province exports up 37.3% despite pandemic  
Vietnam's automobile sales slip to record low due to COVID-19  
Thai Binh moves to boost support industry development

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,764.69	-0.7%	-1.2%	1.0%	53.9%	AED/USD	3.67	0.0%	0.0%
Egypt	11,140.22	0.9%	0.8%	0.0%	2.7%	EGP/USD	15.70	-0.1%	-0.2%
India	17,355.30	-0.1%	-0.1%	1.3%	24.1%	INR/USD	73.68	0.3%	0.8%
Kenya	2,061.36	-0.1%	-0.1%	2.0%	10.3%	KES/USD	109.90	0.0%	0.6%
Nigeria	1,615.86	0.01%	0.01%	-0.1%	-1.5%	NGN/USD	412.00	0.1%	4.4%
Saudi Arabia	11,386.38	0.4%	-0.3%	0.6%	31.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	58,494.78	0.5%	0.5%	-4.2%	7.6%	ZAR/USD	14.13	-0.1%	-3.8%
Vietnam	1,444.99	-0.2%	-0.2%	1.1%	34.9%	VND/USD	22,760.50	0.0%	-1.4%

## MSCI Emerging Markets

MSCI Frontier	664.04	0.1%	0.1%	1.1%	16.2%	Brent Crude (\$)	73.51	0.8%	41.9%
MSCI Frontier 100	1,503.49	0.0%	0.0%	1.4%	19.5%	Gold (\$)	1,794.40	0.1%	-5.3%
MSCI Emerging	1,301.54	-0.6%	-0.6%	-0.5%	0.8%	Copper (\$)	9,562.50	-1.4%	23.1%
MSCI World (USD)	3,126.10	0.1%	0.1%	-0.5%	16.2%	Coffee (\$)	167.75	0.7%	40.7%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Fidelity	2.40	4.3%	-4.8%	46.51	Guinness	30.00	-3.2%	57.9%	13.77
International Breweries	5.00	4.2%	-16.0%	3.01	Lafarge Africa	22.00	-1.8%	4.5%	11.04
Sterling	1.53	2.0%	-25.0%	3.91	Custodian	6.65	-0.7%	13.7%	2.24
UBA	7.70	1.3%	-11.0%	86.47	FBNH	7.50	-0.7%	4.9%	124.99
United Capital PLC	8.10	1.3%	94.2%	46.97	UACN	10.30	-0.5%	42.1%	18.25
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%	0.00	UBN	5.00	4.65	7.5%	0.92
Total	199.20	199.20	0.0%	3.86	Cadbury	8.00	6.30	27.0%	4.47
Seplat Petroleum	759.70	759.70	0.0%	2.67	Cap	19.60	15.25	28.5%	1.04
Okomu Oil	110.00	110.00	0.0%	0.49	Unilever	13.50	10.50	28.6%	131.96
Julius Berger	27.00	27.00	0.0%	2.40	Ecobank	5.05	3.90	29.5%	4.11

### Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ras Al Khaimah Poultry	2.64	14.8%	82.1%	0.02	Abu Dhabi National Takaful	6.30	-10.0%	61.5%	0.01
Sharjah Group Co.	3.43	14.7%	303.5%	0.39	Union Insurance Co	0.55	-10.0%	-21.3%	0.13
Al Buhaira Ntl Ins.	1.85	3.4%	8.2%	6.17	Easylease motorcycle rentals	50.45	-9.8%	186.6%	7.01
Emirates Insurance Co.	6.50	2.4%	-8.5%	0.07	Zee Store	43.00	-6.9%	309.5%	14.97
Ras Al Khaimah Ceramics	2.86	0.4%	90.7%	4.66	Fujairah Cement Industries	0.51	-5.9%	-61.1%	0.04
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.	1.85	1.85	0.0%	6.17	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£)
Egyptian for Tourism Resorts	2.33	5.9%	64.1%	14.84	Raya Holding For Financial Investments	2.41	-0.8%	230.1%	0.62
Palm Hills Development Company	2.04	4.4%	49.2%	13.80	Speed Medical	1.94	-0.4%	19.0%	18.23
Cleopatra Hospital Company	4.65	2.4%	-2.3%	0.32					
Misr Fertilizers Production Company - Mopco	85.98	2.4%	46.2%	1.50					
Pioneers Holding	6.00	2.2%	49.3%	31.80					
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	14.41	14.41	0.0%	0.73	Commercial International Bank(Egypt)	45.97	45.97	0.0%	81.81
Sidi Kerir Petrochemicals	9.75	9.75	0.0%	4.66	GB AUTO	4.00	4.00	0.0%	1.54
Pioneers Holding	6.00	6.00	0.0%	31.80	Medinet Nasr Housing	2.97	2.97	0.0%	5.35
Oriental Weavers	9.19	9.19	0.0%	2.14	Palm Hills Development Company	2.04	2.04	0.0%	13.80
MM Group For Industry And International Trade	7.54	7.54	0.0%	2.17	T M G Holding	7.54	7.54	0.0%	6.96

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Coal India	154.45	3.9%	14.0%	5474.696	Reliance Industries	2369.80	-2.3%	19.4%	17930.29
Hindalco Industries	478.70	3.3%	99.0%	7911.23	Icici Bank	707.50	-1.8%	32.2%	4939.69
Kotak Mahindra Bank	1849.00	1.7%	-7.3%	5964.45	SBI Life Insurance	1163.00	-0.9%	28.6%	2761.56
Tata Steel	1470.00	1.6%	128.4%	8230.93	HUL	2787.00	-0.8%	16.3%	3744.55
Tata Consultancy Svs.	3841.50	1.3%	34.2%	6475.45	Hdfc Bank	1555.75	-0.8%	8.3%	6990.07
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Bharat Petroleum	498.90	499.25	-0.1%	5309.70	Hero Motocorp	2795.00	2636.00	6.0%	781.02
Hindalco Industries	478.70	480.50	-0.4%	7911.23	Maruti Suzuki India	6873.60	6270.15	9.6%	3486.86
Nestle India Limited	20429.00	20530.00	-0.5%	766.07	Dr Reddys Lab	4932.00	4135.00	19.3%	1467.87
Hcl Technologies	1208.75	1215.00	-0.5%	4471.67	Britannia Inds.	4094.70	3317.30	23.4%	699.20
Grasim Industries	1604.00	1614.20	-0.6%	1547.31	Reliance Industries	2369.80	1830.00	29.5%	17930.29

## 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	52.00	2.0%	42.3%	172.23	Nairobi Securities Exchange Plc	9.36	-3.7%	14.7%	0.04
Kenya Power & Lighting Limited	1.61	1.9%	-5.8%	0.58	WPP Scangroup Plc	5.36	-3.6%	-10.7%	3.00
Stanbic Holdings	90.75	1.7%	6.8%	0.02	Bamburi Cement Limited	37.10	-2.8%	-2.0%	2.39
Diamond Trust Bank Limited	65.00	1.6%	-13.3%	0.03	Kengen Limited	4.96	-0.4%	5.3%	0.57
NCBA Group Plc	28.00	1.3%	4.7%	1.19	Safaricom Plc	42.40	-0.2%	23.8%	390.43
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	25.60	26.50	-3.4%	0.63	Standard Chartered Bank Kenya Ltd	135.00	127.00	6.3%	0.72
NCBA Group Plc	28.00	29.00	-3.4%	1.19	Diamond Trust Bank Limited	65.00	57.50	13.0%	0.03
The Cooperative Bank of Kenya Ltd	13.40	14.05	-4.6%	1.25	East African Breweries Limited	174.75	148.00	18.1%	5.03
Equity Group Holdings Plc	52.00	55.00	-5.5%	172.23	Total Kenya Ltd	25.65	21.50	19.3%	0.12
Absa Bank Kenya	10.45	11.15	-6.3%	1.04	Centum Investment Company Plc	17.00	14.05	21.0%	2.13

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Aldrees Petroleum and Transport Services Co.	73.50	5.2%	13.3%	137.92	SABIC Agri-Nutrients Co	136.00	-2.9%	68.7%	59.35
Naseej International Trading Co	112.60	4.3%	13.7%	315.39	Bupa Arabia for Coop Insurance Co.	160.40	-2.2%	31.3%	14.22
Methanol Chemicals Co.	31.40	4.2%	143.4%	258.34	Batic Investments and Logistics Co.	45.40	-2.2%	30.1%	38.04
Rabigh Refining and Petrochemical Co.	26.95	4.1%	95.0%	71.82	United Cooperative Assurance Co.	30.65	-1.8%	79.2%	16.36
Takween Advanced Industries Co.	22.80	3.6%	62.9%	36.57	Tabuk Agricultural Development Co.	40.65	-1.7%	25.5%	76.24
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%	23.12	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.10	61.10	0.0%	132.55	BinDawood Holding Co.	109.20	105.60	3.4%	20.83
Zamil Industrial Investment Co.	40.10	40.10	0.0%	33.44	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	145.20	145.20	0.0%	31.77	Savola Group	39.95	36.60	9.2%	32.77
United Cooperative Assurance Co.	30.65	30.65	0.0%	16.36	Alkhabeer REIT Fund	9.65	8.11	19.0%	1.23

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Sasol Limited	24050.00	8.5%	79.6%	72164.19	Prosus	119500.00	-2.6%	-25.6%	173730.77
Anglo American Platinum	144558.00	5.1%	6.3%	40626.72	Mondi	38876.00	-1.8%	13.3%	12239.68
Northam Platinum	18289.00	4.1%	-12.7%	42959.18	Naspers Ltd	236820.00	-0.9%	-21.6%	181633.36
Redefine Properties	440.00	3.5%	32.1%	3650.45	Bid Corporation	30551.00	-0.1%	16.2%	14015.91
Aspen Phmc.R.Hdg.	22609.00	3.4%	80.3%	33244.02	Growthpoint Prop	1455.00	0.3%	15.8%	8755.55
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)
Clicks Group	30603.00	30774.00	-0.6%	12068.63	Brit.Amer.Tobacco	52221.00	50757.00	2.9%	24274.46
Aspen Phmc.R.Hdg.	22609.00	22805.00	-0.9%	33244.02	Naspers Ltd	236820.00	229087.00	3.4%	181633.36
RMB Holdings Ltd	148.00	151.00	-2.0%	539.05	Anglogold Ashanti	22300.00	21500.00	3.7%	22271.84
Capitec Bank	189552.00	193695.00	-2.1%	29935.38	Gold Fields	12260.00	11769.00	4.2%	20156.37
Standard Bank Group	14416.00	14978.00	-3.8%	38467.32	Prosus	119500.00	114101.00	4.7%	173730.77

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Saigon Beer Alcohol Beverage Corp.	161500.00	6.7%	-17.2%	152177.38	Vietnam Rubber Group JSC	37700.00	-4.1%	25.9%	286.532.12
Mobile World Inv. Corp	125000.00	5.1%	5.1%	278833.65	Ho Chi Minh City Devp	25200.00	-2.7%	6.1%	69756.89
Tien Phong Commercial Joint Stock Bank	38100.00	1.9%	21.0%	264396.08	BaoViet Holdings	54600.00	-2.5%	-17.3%	52269.37
Khang Dien House Trading & Investment	41250.00	1.7%	54.9%	218.960.18	Phat Dat Real Estate Development Corp	80500.00	-2.2%	92.1%	273.901.00
Vinamilk	87200.00	0.8%	-19.4%	257425.79	Phu Nhuan Jewelry	92000.00	-2.1%	14.7%	44.630.30
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietnam Prosperity	64800.00	64800.00	0.0%	484.640.99	Military Commercial Bank	27900.00	27900.00	0.0%	386118.94
Vietjet Aviation	128000.00	128000.00	0.0%	131903.97	Vietnam National Petroleum Group	50300.00	50300.00	0.0%	61013.52
Vingroup JSC	92000.00	92000.00	0.0%	168970.27	PetroVietnam Power Corp	11850.00	11850.00	0.0%	124.535.32
Vinhomes	107000.00	107000.00	0.0%	1,055.580.79	Sai Gon Thuong Tin Commercial	26900.00	26900.00	0.0%	287.868.85
Techcombank	48950.00	48950.00	0.0%	334323.49	Tien Phong Commercial Joint Stock Bank	38100.00	38100.00	0.0%	264396.08

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