

Daily Market Report

17 September 2021

JSE

JSE All-Share Index dropped by 1.66% to close at 63,313.75 points on Thursday, as the Resources and Industrial sectors recorded losses.

BRVM

BRVM Composite Index closed at 178.93 points, up by 0.12% on Thursday with CFAO Motors Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top gainers.

NSE

NSE All-Share decreased by 0.15% to close at 38,911.31 points on Thursday, as the Industrial, Oil & Gas, Consumer goods and Banking sectors recorded losses.

EGX

EGX 30 Index dropped by 1.37% and closed at 10,996.76 points on Thursday, as the market lost LE 3.6 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 969.90 points on Thursday, as it inched up by 0.02%.

African Markets

Nigeria: NSE 30 Index decreased by 0.14% and closed at 1,616.51 points on Thursday. International Breweries and UBN were the top losers.

Egypt: EGX 30 Index dropped by 1.37% and closed at 10,996.76 points on Thursday, as the market lost LE 3.6 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index increased by 0.26% and closed at 2,051.80 points on Thursday. Kenya Power & Lighting and Kengen were the top gainers.

South Africa: JSE Top 40 Index dropped by 1.94% to close at 57,098.19 points on Thursday, as the Resources and Industrial sectors recorded losses.

Capital Markets

JSE Johannesburg Stock Exchange ▼ 1.66%

BRVM Bourse Régionale des Valeurs Mobilières ▲ 0.12%

NSE Nigerian Stock Exchange ▼ 0.15%

EGX Egyptian Stock Exchange ▼ 1.37%

ESG Casablanca Stock Exchange ▲ 0.02%

Nigeria Key Indicators

	Current
Inflation	17.38%
Exchange Rate	₦ 410.57

INTERBANK RATES

OBB	7.00 ▼
Overnight	7.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased 0.76% to close at 7,883.22 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index rose by 0.80% to close at 417.64 points.

Vietnam: VN-30 Index increased by 0.29% to close at 1,448.98 points on Thursday, as the blue-chip companies recorded gains. MSCI Vietnam declined by 0.12% to close at 1023.99 points.

Saudi Arabia: Tadawul All Share Index was up by 0.10% to close at 11,422.11 points on Thursday, Thursday, as gains in the Energy & Utilities, Industrial Investment and Agriculture & Food sectors led shares higher. MSCI Tadawul 30 Index increased by 0.11% to close at 1,549.38 points.

India: Nifty 50 market increased by 0.63% to close at 17,629.50 points on Thursday as gains in the Banking, Public Sector Undertakings and Fast-Moving Consumer Goods sectors led shares higher. MSCI India increased by 0.35% to close at 2,062.62 points.

News

Nigeria:

FG woos local investors, opens \$3bn Eurobond borrowing plan
Lagos FZ firm issues N10.5bn bond for infrastructure
Unity Bank, others fund N15.5bn equipment for Julius Berger

Kenya:

Equity beats KCB in subsidiaries' earnings
Kenya spends Sh1.7bn to secure foreign loans
Kenya Eurobond yields in mixed performance

Abu Dhabi:

ADQ to wholly acquire Swiss-based pharmaceutical company Acino
Promoting partnership: UAE to invest \$13.8bn in UK 'priority' industries
Abu Dhabi's Mubadala invests in metal concentrates trading platform

Saudi Arabia:

Saudi Arabia's crude oil exports hit six-month high in July
Saudi Solutions by STC IPO final price set at \$40 per share
Saudi developer hires BMG for largest IPO on Nomu at SR1bn

Egypt:

Central Bank of Egypt leaves interest rates on hold
EIB approves €4.8 bn commitment to accelerate climate action, COVID vaccines
Dollar exchange rate remains stable at Egypt's banks

South Africa:

FirstRand posts 56% full-year profit jump
Growthpoint heads into 2022 with solid balance sheet and strong liquidity
Manufacturers remain optimistic in third quarter - Absa

India:

FM lays out 'bad bank' blueprint with govt guarantee worth Rs 30,600 cr
Airtel to conserve Rs 40k cr cash through moratorium
Kotak group cos to buy VW's entire finance portfolio

Vietnam:

Pandemic will continue to hit State budget revenue in the coming months
PetroVietnam rolls out measures to ensure operations in new situation
SCIC pumps \$300m to buy Vietnam Airlines equity

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,883.22	0.8%	0.3%	2.6%	56.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,996.76	-1.4%	-0.5%	-1.3%	1.4%	EGP/USD	15.71	-0.1%	-0.1%
India	17,629.50	0.6%	1.5%	2.9%	26.1%	INR/USD	73.52	0.0%	0.6%
Kenya	2,051.80	0.3%	-0.6%	1.5%	9.8%	KES/USD	110.05	0.0%	0.8%
Nigeria	1,616.51	-0.1%	0.1%	0.0%	-1.4%	NGN/USD	412.00	0.1%	4.4%
Saudi Arabia	11,422.11	0.1%	0.0%	0.9%	31.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	57,098.19	-1.9%	-1.9%	-6.5%	5.0%	ZAR/USD	14.61	1.3%	-0.5%
Vietnam	1,448.98	0.3%	0.0%	1.4%	35.3%	VND/USD	22,755.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	666.05	-0.1%	0.4%	1.4%	16.5%	Brent Crude (\$)	75.67	0.3%	46.1%
MSCI Frontier 100	1,512.97	0.1%	0.7%	2.0%	20.3%	Gold (\$)	1,756.70	-2.1%	-7.3%
MSCI Emerging	1,276.78	-0.9%	-2.5%	-2.4%	-1.1%	Copper (\$)	9,366.50	-2.7%	20.6%
MSCI World (USD)	3,122.57	-0.2%	0.0%	-0.6%	16.1%	Coffee (\$)	168.78	1.0%	41.6%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
United Capital PLC	8.35	1.8%	100.2%	18.07	International Breweries	4.80	-4.0%	-19.3%	0.49
Sterling	1.50	1.4%	-26.5%	3.84	UBN	4.85	-3.0%	-9.3%	9.40
Transnational Corporation	0.93	1.1%	3.3%	3.42	Lafarge Africa	22.00	-2.2%	4.5%	101.82
					FBNH	7.50	-1.3%	4.9%	17.13
					P Z Cussons	5.80	-0.9%	9.4%	3.15
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	4.50	4.50	0.0%	0.00	UBN	4.85	4.65	4.3%	9.40
Total	199.20	199.20	0.0%	69.76	Cadbury	8.00	6.30	27.0%	0.42
Seplat Petroleum	710.00	710.00	0.0%	143.03	Cap	19.60	15.25	28.5%	5.28
Okomu Oil	110.00	110.00	0.0%	6.17	Unilever	13.50	10.50	28.6%	2.55
Julius Berger	27.00	27.00	0.0%	0.30	Ecobank	5.05	3.90	29.5%	1.82

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RESPONSE PLUS HOLDING	16.20	16.6%	29.6%	55.45	Ras Al Khaimah Cement Investment Co	2.71	-10.0%	-20.1%	30.12
Oman & Emirates Investment Holding Co	0.38	11.1%	-5.0%	0.00	Zee Store Prjsc	38.60	-7.7%	267.6%	17.41
Abu Dhabi National for Building Materials	0.32	6.3%	23.2%	0.00	Bank of Sharjah PJSC	0.55	-4.7%	-12.2%	1.45
Manazel PJSC	0.47	5.4%	34.0%	8.46	Abu Dhabi Ship Building	4.17	-2.3%	79.0%	3.15
First Abu Dhabi Bank	18.70	2.5%	45.0%	531.96	Sharjah Cement	0.65	-2.3%	-15.1%	0.07
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%	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	1.98	5.7%	21.2%	74.84	T M G Holding	7.45	-4.2%	13.4%	53.65
Ezz Steel	15.18	2.2%	41.5%	7.04	Alexandria Mineral Oils Company	3.50	-4.1%	12.2%	72.86
Raya Holding For Financial Investments	2.42	2.1%	231.5%	0.22	Ibnsina Pharma	3.66	-3.7%	-28.1%	20.58
Egyptian Financial Group-HermesHolding Company	12.79	2.1%	-12.6%	10.80	Fawry For Banking TechnologyAnd Electronic Payment	16.51	-2.9%	-36.8%	388.09
Credit Agricole Egypt	28.00	1.6%	-3.5%	4.66	Palm Hills Development Co	2.04	-2.3%	49.6%	11.47
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	14.75	14.75	0.0%	21.62	Commercial International Bank(Egypt)	44.30	44.30	0.0%	135.31
Sidi Kerir Petrochemicals	9.70	9.70	0.0%	10.29	GB AUTO	4.10	4.10	0.0%	3.90
Pioneers Holding	6.02	6.02	0.0%	21.56	Medinet Nasr Housing	2.98	2.98	0.0%	7.78
Oriental Weavers	9.04	9.04	0.0%	3.10	Palm Hills Development Co	2.04	2.04	0.0%	11.47
MM Group For Industry AndInternational Trade	7.72	7.72	0.0%	15.10	T M G Holding	7.45	7.45	0.0%	53.65

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Indusind Bank	1131.00	7.3%	26.4%	30995.687	Grasim Industries	1578.60	-1.8%	70.1%	1356.01
ITC	230.30	6.6%	10.2%	34214.51	Bharti Airtel	715.75	-1.3%	40.4%	32032.68
State Bank Of India	465.00	4.8%	69.1%	19433.30	Tata Consultancy Svs.	3903.05	-1.3%	36.3%	11586.11
Reliance Industries	2424.00	1.9%	22.1%	14949.04	Shree Cement limited	30650.15	-1.3%	27.6%	2842.67
Indian Oil	118.55	1.9%	30.3%	1657.93	Tata Steel	1436.90	-1.3%	123.2%	8106.08
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Indian Oil	118.55	119.00	-0.4%	1657.93	Maruti Suzuki India	6930.00	6270.15	10.5%	3844.95
Larsen & Toubro	1721.00	1728.50	-0.4%	3664.88	Hero Motocorp	2924.95	2636.00	11.0%	3254.55
State Bank Of India	465.00	467.45	-0.5%	19433.30	Dr Reddys Lab	4919.10	4135.00	19.0%	1469.47
Hindalco Industries	483.25	488.00	-1.0%	3875.61	Britannia Inds.	4075.95	3317.30	22.9%	991.54
Icici Bank	726.90	734.80	-1.1%	9798.99	Reliance Industries	2424.00	1830.00	32.5%	14949.04

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kenya Power & Lighting Limited	1.70	6.3%	-0.6%	6.75	WPP Scangroup Plc	5.22	-3.0%	-13.0%	0.48
Kengen Limited	4.82	3.2%	2.3%	0.22	Kenya Reinsurance Corporation Ltd	2.53	-2.7%	9.1%	0.12
Nairobi Securities Exchange Plc	9.26	2.9%	13.5%	0.05	Standard Chartered Bank Kenya Ltd	131.00	-2.4%	-9.2%	2.78
Equity Group Holdings Plc	52.00	2.0%	42.3%	62.71	Nation Media Group	25.20	-1.6%	63.1%	0.17
Bamburi Cement Limited	37.95	1.9%	0.3%	0.10	Absa Bank Kenya	10.45	-1.4%	8.2%	1.38
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	27.65	29.00	-4.7%	1.68	Standard Chartered Bank Kenya Ltd	131.00	127.00	3.1%	2.78
Nation Media Group	25.20	26.50	-4.9%	0.17	Diamond Trust Bank Limited	63.25	57.50	10.0%	0.03
Equity Group Holdings Plc	52.00	55.00	-5.5%	62.71	East African Breweries Limited	175.00	148.00	18.2%	3.36
Safaricom Plc	42.65	45.25	-5.7%	401.78	The Cooperative Bank of Kenya Ltd	13.10	11.05	18.6%	2.96
The Cooperative Bank of Kenya Ltd	13.10	14.05	-6.8%	2.96	Total Kenya Ltd	25.50	21.50	18.6%	0.01

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Naseej International Trading Co	120.40	5.6%	21.6%	323.88	Saudi Research and Marketing Group	160.00	-4.8%	103.8%	36.46
Basic Chemical Industries Co.	44.60	4.6%	33.7%	136.19	Kingdom Holding	10.36	-4.4%	30.3%	12.20
SABIC Agri-Nutrients Co	146.00	4.3%	81.1%	208.25	Bupa Arabia for Cooperative Insurance Co.	149.20	-3.7%	22.1%	59.27
Leejam Sports Co.	99.00	4.2%	28.1%	105.05	Arriyadh Development Co.	29.00	-2.2%	68.8%	62.32
Methanol Chemicals Co.	34.75	3.6%	169.4%	260.60	Ethihad Etisalat Co.	30.80	-1.9%	7.5%	65.65
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	66.40	66.40	0.0%	11.21	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	61.50	61.50	0.0%	241.05	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
Zamil Industrial Investment Co.	39.35	39.35	0.0%	23.32	BinDawood Holding Co.	112.80	105.60	6.8%	74.55
United Electronics Co.	146.40	146.40	0.0%	83.17	Savola Group	39.90	36.60	9.0%	18.37
United Cooperative Assurance Co.	30.95	30.95	0.0%	8.77	Saudia Dairy and Foodstuff Co.	164.60	139.00	18.4%	5.25

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Investec Ltd	5698.00	1.3%	51.3%	15856.95	Gold Fields	11850.00	-6.3%	-13.9%	73519.81
Investec Plc	5788.00	1.2%	58.0%	9791.02	Anglo American Platinum	134345.00	-5.8%	-1.2%	78174.42
Mondi	39538.00	1.1%	15.2%	88597.98	Northam Platinum	16748.00	-5.2%	-20.1%	47890.12
Prosus	119600.00	1.0%	-25.5%	690330.96	ABSA Group	14400.00	-4.6%	20.1%	114303.27
Reinet Investments	27654.00	0.8%	0.3%	43961.90	Impala Platinum	17426.00	-4.6%	-13.7%	146696.16
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)
RMB Holdings Ltd	148.00	151.00	-2.0%	214.42	Gold Fields	11850.00	11769.00	0.7%	73519.81
Aspen Phmc.Hdg.	23025.00	23503.00	-2.0%	73083.97	Anglogold Ashanti	21525.00	21356.00	0.8%	93781.00
Capitec Bank	188575.00	193695.00	-2.6%	142038.46	Naspers Ltd	236111.00	229087.00	3.1%	419427.11
Clics Group	29830.00	30774.00	-3.1%	68222.52	Prosus	119600.00	114101.00	4.8%	690330.96
Redefine Properties	455.00	471.00	-3.4%	6881.89	Brit.Amer.Tobacco	53659.00	50757.00	5.7%	113953.74

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vincom Retail	30000.00	5.1%	-72.2%	440.457,12	Vingroup JSC	87800.00	-3.9%	-10.3%	1.338.540,58
Khang Dien House Trading & Investment	42700.00	3.6%	60.3%	259.044,04	Saigon Beer Alcohol Beverage	161000.00	-3.0%	-17.4%	32.414,91
Masan Group Corp	149800.00	3.4%	70.0%	339.685,16	Vinhomes	80100.00	-2.2%	198.9%	640.010,27
Vietnam Prosperity	65000.00	1.7%	-48.0%	303.902,44	Saigon Securities Inc	42500.00	-0.9%	102.9%	207.363,30
Vietnam JSC Bank	31650.00	1.6%	18.2%	202.111,38	Mobile World Inv. Corp	123600.00	-0.8%	4.0%	96.058,29
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	65000.00	65000.00	0.0%	303.902,44	Military Commercial Bank	27800.00	27800.00	0.0%	270.290,79
Vietjet Aviation	126000.00	126000.00	0.0%	89.764,58	Vietnam National Petroleum Group	51000.00	51000.00	0.0%	51.910,53
Vingroup JSC	87800.00	87800.00	0.0%	1.338.540,58	PetroVietnam Power Corp	11800.00	11800.00	0.0%	70.853,06
Techcombank	49100.00	49100.00	0.0%	270.249,82	Sai Gon Thuong Tin Commercial	26750.00	26750.00	0.0%	138.956,90
Phu Nhuan Jewelry	93000.00	93000.00	0.0%	59.279,36	Tien Phong Commercial Joint Stock Bank	38650.00	38650.00	0.0%	202.291,23

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