

Daily Market Report

21 September 2021

JSE

JSE All-Share Index dropped by 2.24% to close at 61,453.42 points on Monday, as the Resources and Industrial sectors recorded losses.

BRVM

BRVM Composite Index closed at 180.41 points, up by 0.50% on Monday with Societe Ivoirienne de Banque and Bank of Africa - Benin being the top gainers.

NSE

NSE All-Share decreased by 0.10% to close at 38,906.42 points on Monday, as the Insurance, Banking and Consumer goods sectors recorded losses.

EGX

EGX 30 Index dropped by 1.64% and closed at 10,710.56 points on Monday, as the market lost LE 10.85 billion of market cap, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 972.33 points on Monday, as it declined by 0.51%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 2.24%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.50%
NSE Nigerian Stock Exchange	▼ 0.10%
EGX Egyptian Stock Exchange	▼ 1.64%
ESG Casablanca Stock Exchange	▼ 0.51%

African Markets

Nigeria: NSE 30 Index decreased by 0.11% and closed at 1,615.52 points on Monday. Guaranty and Unilever were the top losers.

Egypt: EGX 30 Index dropped by 1.64% and closed at 10,710.56 points on Monday, as the market lost LE 10.85 billion of market cap, amid Egyptian selling.

Kenya: NSE 20 Index decreased by 0.22% and closed at 2,056.99 points on Monday. Total Kenya and The Cooperative Bank of Kenya were the top losers.

South Africa: JSE Top 40 Index dropped by 2.40% to close at 55,246.07 points on Monday, as the Resources and Industrial sectors recorded losses.

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.59
INTERBANK RATES	
OBB	14.50 ▼
Overnight	15.25 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.80% to close at 7,745.69 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index dropped by 2.24% to close at 413.95 points.

Vietnam: VN-30 Index increased by 0.21% to close at 1,458.66 points on Monday, as the blue-chip companies recorded gains. MSCI Vietnam declined by 0.16% to close at 1020.21 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.61% to close at 11,328.33 points on Monday, as losses in the Energy & Utilities, Transport and Media & Publishing sectors pushed shares lower. MSCI Tadawul 30 Index declined 0.46% to close at 1,538.30 points.

India: Nifty 50 market decreased by 1.07% to close at 17,396.90 points on Monday, as losses in the Metals, Public Sector Undertakings and Real Estate sectors pushed shares lower. MSCI India fell by 1.22% to close at 2,025.58 points.

News

Nigeria:

Emefiele: CBN to Okay Legitimate FX Demand Exceeding Approved Cap
Nigeria's Rig Count Soars as NNPC, Partners Set to Pump More Oil
ABSA Advocates Social Investment Plan from Oil and Gas proceeds

Kenya:

Businesses breathe sigh of relief after KRA minimum tax setback
Trade deficit widens 36pc on weak shilling, rising imports
Bonds turnover rises threefold on excess liquidity

Abu Dhabi:

Abu Dhabi Ports signs deal with Iraqi ports company to explore investment opportunities
Amazon to create 1,500 new jobs in UAE
Abu Dhabi IHC's Emirates Stallions Group bags \$12.5m deal

Saudi Arabia:

Saudi banks see robust growth in financing, deposits in Q2
Saudi retains top spot in oil supplies to China with volumes up 53% y/y
Saudi Arabia's blockchain market to grow 41% by 2025

Egypt:

CBE, FRA cooperate to streamline consumer finance payment procedures
Healthcare Insurance Agency's revenues up 36%, investment returns up 129%: FM
Egypt's central bank issues LE 12B in T-bonds Monday

South Africa:

Retailer confidence increases to a seven-year-high
SA adopts lower emission target ahead of COP26 meeting
RMI to unbundle Discovery and Momentum Metropolitan

India:

CIL arm inks Rs 1,880cr deal with CBM developer
EPFO adds 14.65 lakh net new subscribers in July
At Rs 3,750-crore, RIL to spend 25% more on JioPhone subsidy

Vietnam:

Foreign investment into Vietnamese start-ups expected to rise despite COVID-19
Firms to resume operations as city lifts lockdown in parts
Forum promotes Vietnam-Czech Republic trade, investment

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,745.70	-0.8%	-1.7%	0.8%	53.5%	AED/USD	3.67	0.0%	0.0%
Egypt	10,710.56	-1.6%	-2.6%	-3.9%	-1.2%	EGP/USD	15.73	0.1%	0.0%
India	17,396.90	-1.1%	-1.1%	1.5%	24.4%	INR/USD	73.74	0.4%	0.9%
Kenya	2,056.99	-0.2%	-0.2%	1.8%	10.1%	KES/USD	110.20	0.0%	0.9%
Nigeria	1,615.52	-0.1%	-0.1%	-0.1%	-1.5%	NGN/USD	411.75	0.1%	4.3%
Saudi Arabia	11,328.33	-0.6%	-0.8%	0.1%	30.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	55,246.07	-2.4%	-2.4%	-9.5%	1.6%	ZAR/USD	14.79	0.3%	0.7%
Vietnam	1,458.66	0.2%	0.2%	2.1%	36.2%	VND/USD	22,771.00	0.0%	-1.3%

MSCI Emerging Markets

MSCI Frontier	660.05	-0.8%	-0.8%	0.5%	15.5%	Brent Crude (\$)	73.92	-1.9%	42.7%
MSCI Frontier 100	1,500.46	-0.8%	-0.8%	1.2%	19.3%	Gold (\$)	1,763.80	0.7%	-6.9%
MSCI Emerging	1,258.23	-1.7%	-1.7%	-3.9%	-2.6%	Copper (\$)	9,033.00	-3.0%	16.3%
MSCI World (USD)	3,046.20	-1.6%	-1.6%	-3.0%	13.2%	Coffee (\$)	168.46	-0.7%	41.3%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.79	3.9%	14.5%	0.86	P Z Cussons	5.50	-6.0%	3.8%	8.55
UBN	5.00	3.1%	-6.5%	1.83	Unilever	13.20	-2.2%	-5.0%	8.44
Lafarge Africa	22.00	2.3%	4.5%	49.23	Fidelity	2.38	-2.1%	-5.6%	22.19
United Capital PLC	9.00	1.1%	115.8%	61.65	Zenith	23.50	-1.3%	-5.2%	133.52
Ecobank	5.10	1.0%	-15.0%	26.15					
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%	0.02	UBN	5.00	4.65	7.5%	1.83
Total	199.20	199.20	0.0%	28.00	Unilever	13.20	10.50	25.7%	8.44
Seplat Petroleum	710.00	710.00	0.0%	80.54	Cadbury	8.00	6.30	27.0%	0.69
Okomu Oil	104.00	104.00	0.0%	40.75	Cap	19.60	15.25	28.5%	1.38
Julius Berger	27.00	27.00	0.0%	2.02	Ecobank	5.10	3.90	30.8%	26.15

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Palms Sports	15.52	15.0%	17.6%	10.25	Sharjah Group Co.	3.40	-9.8%	300.0%	0.02
Esg Emirates Stallions Group P.J.S.C	7.78	9.6%	87.0%	5.02	Ooredoo	6.45	-9.7%	-14.2%	0.25
Zee Store Prjsc	42.50	9.0%	304.8%	9.79	Response Plus Holding	15.58	-5.1%	24.6%	5.50
Ras Al Khaimah Cement Investment Co	2.99	8.3%	-11.8%	29.74	RAK Co. for White Cement & Construction	1.06	-3.6%	24.9%	0.49
Al Qudra Holding	3.34	6.4%	203.6%	4.09	Al Seer Marine Supplies & Equipment Co	15.50	-3.0%	3.3%	16.40
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£)
Abou Kir Fertilizers	19.37	0.2%	-6.3%	15.03	Egyptian for Tourism Resorts	1.98	-6.2%	39.4%	9.57
					Ibnsina Pharma	5.25	-5.6%	3.1%	10.08
					Orascom Development Egypt	7.00	-4.6%	42.9%	16.42
					Misr Fertilizers Production Company - Mopco	2.79	-4.5%	-95.3%	18.79
					Speed Medical	9.40	-4.1%	476.7%	25.64
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£)
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	14.49	14.49	0.0%	13.25	Commercial International Bank(Egypt)	43.99	43.99	0.0%	35.42
Speed Medical	9.40	9.40	0.0%	25.64	Medinet Nasr Housing	3.50	3.50	0.0%	13.31
Raya Holding For Financial Investments	5.62	5.62	0.0%	25.73	Misr Fertilizers Production Company - Mopco	2.79	2.79	0.0%	18.79
Pioneers Holding	1.94	1.94	0.0%	4.51	Sidi Kerir Petrochemicals	2.35	2.35	0.0%	0.70
Palm Hills Development Company	8.90	8.90	0.0%	2.62	T M G Holding	1.90	1.90	0.0%	26.48

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
HUL	2800.60	2.9%	16.9%	7450.633	Tata Steel	1247.35	-10.0%	93.8%	36512.27
Bajaj Finserv	17018.60	1.1%	91.1%	5561.51	Jsw Steel	629.85	-7.7%	62.7%	6717.54
ITC	232.95	0.8%	11.5%	16600.30	Hindalco Industries	444.00	-6.1%	84.6%	8133.31
Nestle India Limited	20320.00	0.7%	10.5%	1858.99	UPL	702.90	-5.3%	50.7%	2211.41
Hcl Technologies	1270.40	0.6%	34.3%	7000.02	State Bank Of India	436.90	-3.8%	58.9%	8174.79
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
HUL	2800.60	2825.00	-0.9%	7450.63	Hero Motocorp	2890.00	2636.00	9.6%	1279.12
Nestle India Limited	20320.00	20609.15	-1.4%	1858.99	Maruti Suzuki India	6942.50	6270.15	10.7%	3831.91
Britannia Inds.	4068.05	4153.00	-2.0%	1189.84	Dr Reddys Lab	4749.75	4135.00	14.9%	1601.89
Bharti Airtel	721.25	737.00	-2.1%	10227.40	Britannia Inds.	4068.05	3317.30	22.6%	1189.84
Hcl Technologies	1270.40	1298.80	-2.2%	7000.02	Bharat Petroleum	419.50	325.00	29.1%	3140.46

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Nairobi Securities Exchange Plc	9.82	6.0%	20.3%	0.13	Total Kenya Ltd	24.05	-5.7%	0.2%	0.83
Diamond Trust Bank Limited	63.25	0.8%	-15.7%	0.06	The Cooperative Bank of Kenya Ltd	13.25	-1.9%	6.0%	1.86
NCBA Group Plc	27.85	0.7%	4.1%	0.72	WPP Scangroup Plc	5.12	-1.5%	-14.7%	1.52
					Kenya Reinsurance Corporation Ltd	2.50	-1.2%	7.8%	1.07
					Kenya Power & Lighting Limited	1.68	-1.2%	-1.8%	0.37
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)
Equity Group Holdings Plc	53.00	55.00	-3.6%	4.60	Standard Chartered Bank Kenya Ltd	133.25	127.00	4.9%	0.65
NCBA Group Plc	27.85	29.00	-4.0%	0.72	Diamond Trust Bank Limited	63.25	57.50	10.0%	0.06
KCB Group Plc	48.35	50.75	-4.7%	34.34	Total Kenya Ltd	24.05	21.50	11.9%	0.83
Safaricom Plc	42.90	45.25	-5.2%	70.61	East African Breweries Limited	175.00	148.00	18.2%	40.16
Nation Media Group	25.00	26.50	-5.7%	2.39	The Cooperative Bank of Kenya Ltd	13.25	11.05	19.9%	1.86

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	129.40	6.1%	30.7%	294.36	Basic Chemical Ind.	46.05	-5.1%	38.1%	134.10
Kingdom Holding Co.	11.60	5.1%	45.9%	53.89	Makkah Construction and Development Co.	72.00	-3.9%	12.5%	22.38
Bawan Co.	43.25	1.8%	74.1%	86.30	Al Sagr Coop Insurance Co.	14.60	-3.8%	-6.3%	26.74
Alkhorayef Water and Power Technologies Co.	127.40	1.8%	36.1%	88.40	Ataa Educational Co.	61.20	-3.2%	54.9%	16.43
Sahara International Petrochemical Co.	37.90	1.6%	118.8%	188.40	Yamama Cement Co.	30.95	-3.1%	4.7%	17.79
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	65.60	65.60	0.0%	12.81	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.40	60.40	0.0%	73.20	BinDawood Holding Co.	109.60	105.60	3.8%	33.61
Zamil Industrial Investment Co.	38.50	38.50	0.0%	26.54	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	144.40	144.40	0.0%	14.73	Savola Group	39.05	36.60	6.7%	17.10
United Cooperative Assurance Co.	31.15	31.15	0.0%	12.15	Saudia Dairy and Foodstuff Co.	163.80	139.00	17.8%	1.03

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Gold Fields	12213.00	4.2%	-11.2%	41811.78	Discovery Ltd	12224.00	-6.0%	-20.4%	29481.56
Remgro Limited	12190.00	1.9%	26.7%	23676.72	Anglo American	49650.00	-5.6%	4.6%	152489.20
Aspen Phmc.Hdg.	23867.00	1.0%	90.4%	43977.64	Old Mutual Limited	1500.00	-4.9%	26.2%	22526.41
Mr Price Group	20388.00	0.7%	19.5%	21724.82	Mondi	37242.00	-4.1%	8.5%	20897.75
Anglogold Ashanti	21800.00	0.6%	-36.4%	54140.45	Vodacom Group	13635.00	-3.9%	9.6%	19568.72
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.Hdg.	23867.00	23940.00	-0.3%	43977.64	Naspers Ltd	232371.00	229087.00	1.4%	247144.92
Remgro Limited	12190.00	12500.00	-2.5%	23676.72	Anglogold Ashanti	21800.00	21356.00	2.1%	54140.45
Shoprite Limited	18281.00	18836.00	-2.9%	30114.57	Prosus	116500.00	114101.00	2.1%	257632.88
Clicks Group	29714.00	30774.00	-3.4%	25781.50	Gold Fields	12213.00	11726.00	4.2%	41811.78
RMB Holdings Ltd	145.00	151.00	-4.0%	362.12	Brit.Amer.Tobacco	53285.00	50757.00	5.0%	40128.08

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phat Dat Real Estate Development Corp	82900.00	3.6%	97.8%	419063.73	Petrovietnam Gas	88800.00	-3.4%	5.8%	136.830.47
Vinamilk	88700.00	2.5%	-18.0%	481.035.08	Vietnam Rubber Group JSC	37400.00	-3.0%	24.9%	162.103.72
Vietcombank	99600.00	2.5%	399.2%	127.286.19	Masan Group Corp	143000.00	-2.1%	62.2%	153652.98
Techcombank	50700.00	1.9%	200.0%	666827.77	Tien Phong Commercial Joint Stock Bank	40100.00	-1.7%	27.3%	368496.62
Asia Commercial JS Bank	32100.00	1.6%	42.8%	204.905.62	Saigon Beer Alcohol Beverage	158300.00	-1.7%	-18.8%	16.502.15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietnam Prosperity	67500.00	67500.00	0.0%	553.258.62	Military Commercial Bank	28250.00	28250.00	0.0%	471950.42
Vietjet Aviation	124200.00	124200.00	0.0%	88112.12	Vietnam National Petroleum Group	50000.00	50000.00	0.0%	57623.11
Vingroup JSC	86700.00	86700.00	0.0%	348932.59	PetroVietnam Power Corp	11750.00	11750.00	0.0%	117389.77
Techcombank	50700.00	50700.00	0.0%	666827.77	Sai Gon Thuong Tin Commercial	27100.00	27100.00	0.0%	474947.59
Phu Nhuan Jewelry	91000.00	91000.00	0.0%	40.078.41	Tien Phong Commercial Joint Stock Bank	40100.00	40100.00	0.0%	368496.62

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