

Daily Market Report

24 September 2021

JSE

JSE All-Share Index advanced by 1.10% to close at 64,049.05 points on Thursday, as the Resources and Industrial sectors recorded gains.

BRVM

BRVM Composite Index closed at 183.94 points, up by 1.14% on Thursday with Bank of Africa - Burkina Faso and Palm Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched up by 0.06% to close at 38,874.13 points on Thursday, as the Insurance, Oil & Gas, Consumer goods, and Industrial sectors recorded gains.

EGX

EGX 30 Index rose by 0.43% and closed at 10,642.02 points on Thursday, as the market gained LE 7.99 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index closed at 981.64 points on Thursday, as it increased by 0.68%.

African Markets

Nigeria: NSE 30 Index inched up by 0.01% and closed at 1,611.85 points on Thursday. Guaranty and Flour Mills were the top gainers.

Egypt: EGX 30 Index rose by 0.43% and closed at 10,642.02 points on Thursday, as the market gained LE 7.99 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index increased by 0.15% and closed at 2,046.17 points on Thursday. Bamburi Cement and Total Kenya were the top gainers.

South Africa: JSE Top 40 Index advanced by 1.24% to close at 57,642.54 points on Thursday, as the Resources and Industrial sectors recorded gains.

Capital Markets

| | |
|--|---------|
| JSE Johannesburg Stock Exchange | ▲ 1.10% |
| BRVM Bourse Régionale des Valeurs Mobilières | ▲ 1.14% |
| NSE Nigerian Stock Exchange | ▲ 0.06% |
| EGX Egyptian Stock Exchange | ▲ 0.43% |
| ESG Casablanca Stock Exchange | ▲ 0.68% |

Nigeria Key Indicators

| | Current |
|------------------------|----------|
| Inflation | 17.01% |
| Exchange Rate | ₦ 410.67 |
| INTERBANK RATES | |
| ORB | 15.00 ▼ |
| Overnight | 16.00 ▼ |

Other Emerging Markets

Abu Dhabi: ADX General increased 0.55% to close at 7824.79 points on Thursday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index increased by 0.33% to close at 415.41 points.

Vietnam: VN-30 Index increased by 0.34% to close at 1,458.23 points on Thursday, as the blue-chip companies recorded gains. MSCI Vietnam increased by 0.24% to close at 1,022.25 points.

Saudi Arabia: Tadawul All Share Index was closed on the account of National Holiday on Thursday.

India: Nifty 50 market jumped 1.57% to close at 17,822.95 points on Thursday, as gains in the Real Estate, Banking and Capital Goods sectors led shares higher. MSCI India rose by 1.38% to close at 2,076.40 points.

News

Nigeria:

Reps amend Act, empowers AMCON to sell debtors' property
Economy to grow by 1.5%, says JP Morgan
Nigeria recorded N2.29tr fiscal deficit in Q1

Kenya:

Kenya & Ethiopia Seal Deal for Free Trade Area
Kenya Breweries to Invest KSh1 Billion in New Production Line
StanChart gets more time to file evidence in illegal charges suit

Abu Dhabi:

UAE central bank approves Wizz Financial's acquisition of UAE Exchange
UAE Central Bank starts to withdraw COVID-19 stimulus measures
UAE's Mubadala to sell stake in Spanish miner MATSA

Saudi Arabia:

PwC to create over 6,000 jobs with new regional consulting HQ in Riyadh
Moody's upgrades Saudi Telecom's baseline credit assessment
Saudi imports from UAE drop 33% in July after new trade rules

Egypt:

For 2nd time in 2021, Egypt issues dollar-denominated bonds to raise up to \$3B
ITIDA, Plug and Play sign agreement to boost Egyptian startups
Egypt Aluminum turns to profit in FY20/21 adjusted financials

South Africa:

Repo rate stays at 3.5% as expected
SA mines plan R40bn investment in power generation
Absa rolls out ambitious plans for a R9.4 billion B-BBEE deal

India:

Pact with UAE to generate \$100bn trade, says official
Adani Enterprises incorporates wholly-owned arm Adani Digital Labs Pvt Ltd
IndusInd Bank acquires 4.7% in McLeod to recovery dues

Vietnam:

Novaland issue another 500 billion share-backed bonds
Banks slash US\$386 million in interest rates in July-August
RoK firms pour 2.43 billion USD into Vietnam in eight months

Indices and FX Data

| Indices | Last Trade | 1d% | WTD% | MTD% | YTD% | Currency/Commodity | Last Trade | 1d% | YTD% |
|--------------|------------|-------|-------|-------|-------|--------------------|------------|-------|-------|
| Abu Dhabi | 7,824.79 | 0.6% | -0.7% | 1.8% | 55.1% | AED/USD | 3.67 | 0.0% | 0.0% |
| Egypt | 10,642.02 | 0.4% | -3.2% | -4.5% | -1.9% | EGP/USD | 15.71 | 0.0% | -0.1% |
| India | 17,822.95 | 1.6% | 1.4% | 4.0% | 27.5% | INR/USD | 73.64 | -0.3% | 0.8% |
| Kenya | 2,046.17 | 0.2% | -0.7% | 1.3% | 9.5% | KES/USD | 110.40 | 0.0% | 1.1% |
| Nigeria | 1,611.85 | 0.01% | -0.3% | -0.3% | -1.7% | NGN/USD | 412.00 | -0.2% | 4.4% |
| Saudi Arabia | 11,270.57 | 0.0% | -1.3% | -0.4% | 29.7% | SAR/USD | 3.75 | 0.0% | 0.0% |
| South Africa | 57,642.54 | 1.2% | 1.8% | -5.6% | 6.0% | ZAR/USD | 14.64 | -0.6% | -0.3% |
| Vietnam | 1,458.23 | 0.3% | 0.2% | 2.1% | 36.2% | VND/USD | 22,766.00 | 0.0% | -1.4% |

MSCI Emerging Markets

| | | | | | | | | | |
|-------------------|----------|------|-------|-------|-------|------------------|----------|-------|-------|
| MSCI Frontier | 663.36 | 0.3% | -0.3% | 1.0% | 16.0% | Brent Crude (\$) | 77.25 | 1.4% | 49.1% |
| MSCI Frontier 100 | 1,504.84 | 0.2% | -0.5% | 1.5% | 19.6% | Gold (\$) | 1,749.80 | -1.6% | -7.7% |
| MSCI Emerging | 1,272.52 | 0.8% | -0.5% | -2.8% | -1.5% | Copper (\$) | 9,273.50 | -0.1% | 19.4% |
| MSCI World (USD) | 3,106.42 | 1.0% | 0.3% | -1.1% | 15.5% | Coffee (\$) | 168.39 | 0.3% | 41.3% |

STOCKS

Nigeria

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₦) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₦) |
|-----------------------|------------|--------|----------|--------------|---------------------------|------------|-------|----------|------------|
| P Z Cussons | 5.75 | 4.5% | 8.5% | 5.47 | Ecobank | 5.15 | -2.8% | -14.2% | 4.45 |
| Guaranty | 27.40 | 1.3% | -11.8% | 270.93 | Transnational Corporation | 0.90 | -2.2% | 0.0% | 6.88 |
| Flour Mills | 29.35 | 1.2% | 12.9% | 25.68 | United Capital PLC | 8.40 | -1.8% | 101.4% | 97.61 |
| UBA | 7.65 | 0.7% | -11.6% | 29.43 | Wema | 0.76 | -1.3% | 10.1% | 2.67 |
| Lafarge Africa | 22.40 | 0.2% | 6.4% | 14.89 | Sterling | 1.49 | -0.7% | -27.0% | 9.75 |
| 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 | 4.95 | 4.95 | 0.0% | 0.01 | UBN | 4.95 | 4.65 | 6.5% | 0.25 |
| Total | 199.20 | 199.20 | 0.0% | 6.20 | Unilever | 13.20 | 10.50 | 25.7% | 64.63 |
| Seplat Petroleum | 710.00 | 710.00 | 0.0% | 29.19 | Cadbury | 8.00 | 6.30 | 27.0% | 0.15 |
| Okomu Oil | 104.00 | 104.00 | 0.0% | 6.12 | Cap | 19.60 | 15.25 | 28.5% | 6.46 |
| Julius Berger | 27.00 | 27.00 | 0.0% | 6.58 | Sterling | 1.49 | 1.13 | 31.9% | 9.75 |

Abu Dhabi

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn DH) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn DH) |
|---------------------------------|------------|-------|----------|---------------|-----------------------------|------------|-------|----------|-------------|
| Gulf Cement | 0.83 | 9.1% | -1.2% | 0.10 | Sharjah Cement | 0.64 | -2.7% | -15.5% | 0.00 |
| Ooredoo | 7.00 | 8.5% | -6.9% | 0.08 | Palms Sports | 15.20 | -2.6% | 15.2% | 10.22 |
| Sudatel Telecom | 0.39 | 7.2% | -7.0% | 0.11 | Sharjah Group Co. | 3.00 | -2.0% | 252.9% | 0.13 |
| Al Qudra Holding | 3.47 | 6.1% | 215.5% | 3.41 | Bank of Sharjah PJSC | 0.55 | -1.8% | -12.7% | 0.05 |
| National Marine Dredging | 14.02 | 4.6% | 133.3% | 38.47 | Abu Dhabi Islamic Bank | 5.60 | -1.4% | 19.1% | 10.03 |
| 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£) |
|---|------------|-------|----------|---------------|--|------------|-------|----------|-------------|
| Alexandria Mineral Oils Company | 3.49 | 6.1% | 11.9% | 25.47 | Cairo For Investment And Real Estate Devpt | 12.05 | -3.5% | -15.4% | 2.80 |
| Orascom Development Egypt | 4.89 | 3.0% | -0.2% | 1.05 | Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda | 2.11 | -0.9% | -44.5% | 1.81 |
| Egyptian Financial Group-Hermes Holding Company | 1.96 | 2.6% | -86.6% | 15.60 | Pioneers Holding | 5.64 | -0.7% | 40.3% | 11.73 |
| Speed Medical | 1.91 | 2.5% | 17.2% | 12.01 | Telecom Egypt | 14.30 | -0.4% | 19.9% | 7.79 |
| Ezz Steel | 13.56 | 2.1% | 26.4% | 8.81 | Oriental Weavers | 8.80 | -0.3% | 28.5% | 3.22 |
| 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 | 14.30 | 14.30 | 0.0% | 7.79 | Commercial International Bank | 26.72 | 26.72 | 0.0% | 8.33 |
| Sidi Kerir Petrochemicals | 8.99 | 8.99 | 0.0% | 10.40 | Credit Agricole Egypt | 12.22 | 12.22 | 0.0% | 7.41 |
| Pioneers Holding | 5.64 | 5.64 | 0.0% | 11.73 | Egyptian Financial Group-Hermes | 1.96 | 1.96 | 0.0% | 15.60 |
| Oriental Weavers | 8.80 | 8.80 | 0.0% | 3.22 | GB AUTO | 4.16 | 4.16 | 0.0% | 5.20 |
| MM Group For Industry AndInternational Trade | 6.99 | 6.99 | 0.0% | 11.86 | Ibnsina Pharma | 3.42 | 3.42 | 0.0% | 2.32 |

India

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₹) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₹) |
|-----------------------|------------|---------|----------|--------------|------------------------|------------|---------|----------|------------|
| Bajaj Finserv | 18430.00 | 4.6% | 106.9% | 13112.335 | HDFC Life Insurance Co | 725.15 | -1.1% | 7.2% | 1698.70 |
| Hindalco Industries | 483.80 | 4.5% | 101.1% | 6070.23 | Dr Reddys Lab | 4799.95 | -1.0% | -7.8% | 2688.84 |
| Larsen & Toubro | 1774.55 | 3.7% | 37.8% | 6508.85 | Jsw Steel | 674.30 | -0.6% | 74.1% | 2749.68 |
| Tata Motors | 321.00 | 3.5% | 74.6% | 16869.80 | Tata Consumer | 850.00 | -0.5% | 44.1% | 1248.84 |
| Coal India | 167.50 | 3.3% | 23.7% | 5258.13 | ITC | 242.35 | -0.5% | 16.0% | 5299.16 |
| Stocks near 52 w high | Last Price | 52w H | % Change | Value (mn ₹) | Stocks near 52 w Low | Last Price | 52w L | % Change | Val (mn ₹) |
| Larsen & Toubro | 1774.55 | 1775.00 | 0.0% | 6508.85 | Hero Motocorp | 2852.00 | 2636.00 | 8.2% | 1281.76 |
| Reliance Industries | 2488.10 | 2497.00 | -0.4% | 17993.39 | Maruti Suzuki India | 6843.00 | 6270.15 | 9.1% | 2963.38 |
| ONGC | 137.75 | 138.35 | -0.4% | 2553.29 | Dr Reddys Lab | 4799.95 | 4135.00 | 16.1% | 2688.84 |
| Tech Mahindra | 1523.00 | 1531.00 | -0.5% | 3055.16 | Britannia Inds. | 4048.95 | 3317.30 | 22.1% | 1303.08 |
| NTPC | 126.15 | 127.00 | -0.7% | 1394.13 | Bharat Petroleum | 419.55 | 325.00 | 29.1% | 2471.81 |

Kenya

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn KSh) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn KSh) |
|-----------------------------------|------------|-------|----------|----------------|-----------------------------------|------------|--------|----------|--------------|
| Bamburi Cement Limited | 37.85 | 2.7% | 0.0% | 0.05 | The Cooperative Bank of Kenya Ltd | 13.20 | -2.6% | 5.6% | 7.13 |
| Total Kenya Ltd | 24.85 | 1.4% | 3.5% | 0.03 | Equity Group Holdings Plc | 50.75 | -1.0% | 38.9% | 160.75 |
| Stanbic Holdings | 92.00 | 1.1% | 8.2% | 65.42 | WPP Scangroup Plc | 5.38 | -0.4% | -10.3% | 0.75 |
| Absa Bank Kenya | 10.60 | 1.0% | 9.7% | 9.47 | Centum Investment Company Plc | 17.00 | -0.3% | 5.9% | 0.92 |
| Nation Media Group | 25.20 | 0.6% | 63.1% | 0.27 | Diamond Trust Bank Limited | 64.00 | 0.0% | -14.7% | 0.54 |
| 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 | 28.00 | 29.00 | -3.4% | 7.36 | Standard Chartered Bank Kenya Ltd | 130.75 | 127.00 | 3.0% | 2.24 |
| Nation Media Group | 25.20 | 26.50 | -4.9% | 0.27 | Diamond Trust Bank Limited | 64.00 | 57.50 | 11.3% | 0.54 |
| The Cooperative Bank of Kenya Ltd | 13.20 | 14.05 | -6.0% | 7.13 | Total Kenya Ltd | 24.85 | 21.50 | 15.6% | 0.03 |
| Absa Bank Kenya | 10.60 | 11.35 | -6.6% | 9.47 | East African Breweries Limited | 173.50 | 148.00 | 17.2% | 72.04 |
| KCB Group Plc | 47.20 | 50.75 | -7.0% | 128.12 | The Cooperative Bank of Kenya Ltd | 13.20 | 11.05 | 19.5% | 7.13 |

Saudi Arabia*

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn SAR) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn SAR) |
|--|------------|--------|----------|----------------|---|------------|--------|----------|--------------|
| Alandalus Property Co. | 21.66 | 6.8% | 2.3% | 155.70 | National Company for Learning and Education | 64.20 | -2.0% | 23.0% | 2.61 |
| Sahara International Petrochemical Co. | 38.65 | 3.2% | 123.2% | 188.73 | Ash-Sharqiyah Development Co. | 110.00 | -2.0% | 16.2% | 68.15 |
| Gulf Union Alahlia | 18.10 | 3.0% | -11.3% | 10.88 | Fawaz Abdulaziz Alhokair Co. | 21.02 | -1.9% | -3.6% | 24.35 |
| United Cooperative Assurance Co. | 31.95 | 2.6% | 86.8% | 15.24 | Alahli Takaful Co. | 39.90 | -1.9% | 14.3% | 9.67 |
| Saudi Re for Cooperative Reinsurance Co. | 18.16 | 2.0% | 20.1% | 14.48 | Saudi Fisheries Co. | 56.20 | -1.8% | 2.4% | 21.73 |
| 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 | 64.90 | 64.90 | 0.0% | 10.06 | Ntl Agricultural Marketing Co. | 17.20 | 17.00 | 1.2% | 0.00 |
| The Saudi National Bank | 59.80 | 59.80 | 0.0% | 64.30 | BinDawood Holding Co. | 109.20 | 105.60 | 3.4% | 11.70 |
| Zamil Industrial Investment Co. | 38.55 | 38.55 | 0.0% | 17.00 | Abdullah A. M. Al-Khodari Sons Co. | 5.39 | 5.18 | 4.1% | 0.00 |
| United Electronics Co. | 143.60 | 143.60 | 0.0% | 19.22 | Savola Group | 38.70 | 36.60 | 5.7% | 22.90 |
| United Cooperative Assurance Co. | 31.95 | 31.95 | 0.0% | 15.24 | Saudia Dairy and Foodstuff Co. | 164.00 | 139.00 | 18.0% | 1.39 |

*Market closed on 23/9

South Africa

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn R) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn R) |
|-----------------------|------------|-----------|----------|--------------|----------------------|------------|-----------|----------|------------|
| MTN Group | 13645.00 | 4.4% | 126.7% | 85767.46 | Gold Fields | 11987.00 | -4.0% | -12.9% | 21671.32 |
| Aspen Phmc.Hdg. | 25000.00 | 4.0% | 99.4% | 51005.20 | Anglogold Ashanti | 22278.00 | -3.1% | -35.0% | 18376.08 |
| Remgro Limited | 13583.00 | 3.9% | 41.2% | 23882.24 | Mr Price Group | 20393.00 | -2.6% | 19.5% | 21996.26 |
| Impala Platinum | 17900.00 | 3.5% | -11.3% | 91664.68 | Woolworths Hdg. | 5925.00 | -2.6% | 49.8% | 37090.28 |
| Prosus | 121725.00 | 2.6% | -24.2% | 209436.14 | Clicks Group | 29900.00 | -1.7% | 18.3% | 43191.69 |
| 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) |
| Remgro Limited | 13583.00 | 13600.00 | -0.1% | 23882.24 | Gold Fields | 11987.00 | 11726.00 | 2.2% | 21671.32 |
| Vodacom Group | 14793.00 | 14834.00 | -0.3% | 24850.75 | Anglogold Ashanti | 22278.00 | 21356.00 | 4.3% | 18376.08 |
| Shoprite Limited | 19037.00 | 19150.00 | -0.6% | 30358.76 | Brit.Amer.Tobacco | 53745.00 | 50757.00 | 5.9% | 21610.49 |
| MTN Group | 13645.00 | 13743.00 | -0.7% | 85767.46 | Prosus | 121725.00 | 114101.00 | 6.7% | 209436.14 |
| Capitec Bank | 191317.00 | 193695.00 | -1.2% | 43789.97 | Naspers Ltd | 247982.00 | 229087.00 | 8.2% | 176437.95 |

Vietnam

| Top 5 Gainers | Last Price | 1d% | YTD% | Value (mn ₫) | Top 5 Losers | Last Price | 1d% | YTD% | Val (mn ₫) |
|--|------------|-----------|----------|--------------|--|------------|----------|----------|------------|
| Mobile World Inv. Corp | 132000.00 | 5.0% | 11.0% | 337271.33 | BaoViet Holdings | 57800.00 | -2.0% | -12.4% | 113986.68 |
| Tien Phong Commercial Joint Stock Bank | 41550.00 | 3.6% | 31.9% | 734.402.96 | Masan Group Corp | 145000.00 | -1.4% | 64.5% | 136.149.60 |
| Petrovietnam Gas | 90600.00 | 2.5% | 7.9% | 98753.42 | Phu Nhuan Jewelry | 92200.00 | -1.0% | 14.9% | 34381.64 |
| Vinhomes | 79300.00 | 1.7% | 195.9% | 369692.63 | Vinamilk | 90800.00 | -0.8% | -16.1% | 359831.43 |
| Vincom Retail | 28900.00 | 1.6% | -73.2% | 90289.57 | Techcombank | 50200.00 | -0.6% | 197.0% | 435.571.61 |
| 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 | 67000.00 | 67000.00 | 0.0% | 345.238.31 | Military Commercial Bank | 27900.00 | 27900.00 | 0.0% | 329664.17 |
| Vietjet Aviation | 123700.00 | 123700.00 | 0.0% | 86.150.33 | Vietnam National Petroleum Group | 50200.00 | 50200.00 | 0.0% | 46335.86 |
| Vingroup JSC | 87100.00 | 87100.00 | 0.0% | 231.387.09 | PetroVietnam Power Corp | 11750.00 | 11750.00 | 0.0% | 90412.29 |
| Techcombank | 50200.00 | 50200.00 | 0.0% | 435.571.61 | Sai Gon Thuong Tin Commercial | 26600.00 | 26600.00 | 0.0% | 341600.65 |
| Phu Nhuan Jewelry | 92200.00 | 92200.00 | 0.0% | 34381.64 | Tien Phong Commercial Joint Stock Bank | 41550.00 | 41550.00 | 0.0% | 734.402.96 |

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