

Daily Market Report

28 September 2021

JSE

JSE All-Share Index increased by 0.23% to close at 64,197.36 points on Monday, as the Industrial and Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 182.67 points, down by 0.46% on Monday with Oragroup Togo and Total Côte d'Ivoire being the top losers.

NSE

NSE All-Share decreased by 0.25% to close at 38,864.33 points on Monday, as the Insurance and Industrial sectors recorded losses.

EGX

EGX 30 Index dropped by 1.44% and closed at 10,496.00 points on Monday, as the market lost LE 10.97 billion of market cap, amid Egyptian and foreign selling.

ESG

Casablanca ESG 10 Index closed at 987.92 points on Monday, as it increased by 0.12%.

African Markets

Nigeria: NSE 30 Index decreased by 0.39% and closed at 1,610.55 points on Monday. BUA Cement and Ecobank were the top losers.

Egypt: EGX 30 Index dropped by 1.44% and closed at 10,496.00 points on Monday, as the market lost LE 10.97 billion of market cap, amid Egyptian and foreign selling.

Kenya: NSE 20 Index increased by 0.77% and closed at 2,055.40 points on Monday. Nairobi Securities Exchange and WPP Scangroup were the top gainers.

South Africa: JSE Top 40 Index increased by 0.25% to close at 57,784.27 points on Monday, as the Industrial and Resources sectors recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.23%

BRVM

Bourse Régionale des Valeurs Mobilières ▼ 0.46%

NSE

Nigerian Stock Exchange ▼ 0.25%

EGX

Egyptian Stock Exchange ▼ 1.44%

ESG

Casablanca Stock Exchange ▲ 0.12%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.71
INTERBANK RATES	
OBB	15.33 ▼
Overnight	16.00 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.30% to close at 7,751.76 points on Monday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index fell 1.11% to close at 410.80 points.

Vietnam: VN-30 Index declined by 1.42% to close at 1,439.20 points on Monday, as the blue-chip companies recorded losses. MSCI Vietnam fell by 1.23% to close at 1,007.73 points.

Saudi Arabia: Tadawul All Share Index increased by 0.14% to close at 11,369.09 points on Monday, as the Basic Materials, Commercial & Professional services, and Consumer goods sectors ended higher. MSCI Saudi Arabia increased by 0.40% to close 1,548.16 points.

India: Nifty 50 market inched up by 0.01% to close at 17,855.10 points on Monday, as gains in the Real Estate, Technology and IT sectors led shares higher. MSCI India declined by 0.23% to close at 2,068.76 points.

News

Nigeria:

Petrol subsidy hits N905.27bn, oil rises to \$79.71
Ahead of October Launch, eNaira Platform Goes Live
FG spent N1.3tn on agriculture imports in six months – NBS

Kenya:

CBK pays Sh5.5bn dividend to State
Court suspends KRA's new fuel tax
Mobile money agency transactions up 45pc

Abu Dhabi:

National Bank of Fujairah secures approval to raise capital to \$544mln
Shuaa to deliver \$2.76bn worth of London properties in next eight months
Adnoc Drilling raises more than \$1.1bn in oversubscribed IPO

Saudi Arabia:

Aramco, Air Products, ACWA Power, and Air Products Qudra sign agreements
Saudi wealth fund PIF buys 25% stake in Emaar The Economic City
Saudi Telecom commits to minimum dividend policy for 3 years

Egypt:

Production index for transformative, extractive industries falls 12.19% in July
Egypt launches fund with LE1B capital to support financial tech, innovation
Palm Hills Developments inks syndicated loan deal

South Africa:

SA's R15bn South Sudanese oil push to start in November
SA tourism sector jobs plummet by almost a million
Rand falling prey to global worries fuels SA inflation

India:

Govt to borrow Rs 5.03 lakh crore in H2 FY22 to fund revenue gap
30 companies eye offers in October-November, may raise up to Rs 45K cr
India accelerates talks with Taiwan on chip plant, trade deal

Vietnam:

Vietnam Airlines asks to continue listing on HoSE despite negative equity
Vietnamese carmaker aims to conquer European high-end electric car market
FDI tops 22 billion USD in first nine months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,751.76	-0.3%	-0.9%	0.9%	53.6%	AED/USD	3.67	0.0%	0.0%
Egypt	10,496.00	-1.4%	-1.4%	-5.8%	-3.2%	EGP/USD	15.71	0.1%	-0.1%
India	17,855.10	0.0%	0.0%	4.2%	27.7%	INR/USD	73.84	0.2%	1.1%
Kenya	2,055.40	0.8%	0.8%	1.7%	10.0%	KES/USD	110.40	0.1%	1.1%
Nigeria	1,610.55	-0.4%	-0.4%	-0.4%	-1.8%	NGN/USD	413.75	0.5%	4.8%
Saudi Arabia	11,369.09	0.1%	0.9%	0.4%	30.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	57,784.27	0.2%	0.2%	-5.3%	6.3%	ZAR/USD	14.97	-0.1%	1.9%
Vietnam	1,439.20	-1.4%	-1.4%	0.7%	34.4%	VND/USD	22,768.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	658.84	-0.6%	-0.6%	0.3%	15.3%	Brent Crude (\$)	79.53	1.8%	53.5%
MSCI Frontier 100	1,495.94	-0.5%	-0.5%	0.9%	18.9%	Gold (\$)	1,752.00	0.02%	-7.6%
MSCI Emerging	1,267.36	0.2%	0.2%	-3.2%	-1.9%	Copper (\$)	9,362.00	0.3%	20.6%
MSCI World (USD)	3,095.56	-0.3%	-0.3%	-1.5%	15.1%	Coffee (\$)	174.48	1.3%	46.4%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	5.43	9.7%	50.8%	0.57	Axamansard	2.99	-9.9%	184.8%	1.71
Access	9.20	2.8%	8.9%	59.22	BUA Cement	66.00	-2.9%	-14.7%	100.57
Nascon	15.20	2.7%	4.8%	8.15	Transnational Corporation	0.92	-1.1%	2.2%	9.30
Wema	0.78	2.6%	13.0%	0.54	Ecobank	5.25	-0.9%	-12.5%	1.27
FCMB	3.00	1.4%	-9.9%	2.97	UBA	7.45	-0.7%	-13.9%	42.78
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	5.43	5.43	0.0%	0.57	UBN	5.00	4.65	7.5%	2.07
Total	192.00	192.00	0.0%	116.86	Unilever	13.20	10.50	25.7%	4.22
Seplat Petroleum	710.00	710.00	0.0%	13.63	Cadbury	8.00	6.30	27.0%	0.43
Okomu Oil	110.00	110.00	0.0%	5.33	Cap	19.60	15.25	28.5%	3.48
Julius Berger	27.00	27.00	0.0%	4.06	Sterling	1.47	1.13	30.1%	8.69

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Union Insurance Co	0.71	12.3%	1.4%	0.01	Gulf Cement	0.71	-10.0%	-15.3%	0.16
Methaq Takaful Ins.	0.84	4.0%	-3.7%	3.39	Sharjah Group Co.	3.00	-5.4%	252.9%	0.15
Gulf Pharmaceutical Ind.	1.83	1.7%	37.6%	0.47	Sharjah Cement	0.62	-3.4%	-18.4%	0.06
Abu Dhabi Ship Building	4.53	1.3%	94.4%	3.63	Abu Dhabi National Takaful	6.00	-3.2%	53.8%	0.05
Abu Dhabi Islamic Bank	5.71	1.2%	21.5%	7.40	Response Plus Holding	14.90	-2.5%	19.2%	1.02
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
The National Investor PRJSC	0.60	0.60	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£)
GB AUTO	4.19	1.0%	26.2%	33.91	Ezz Steel	12.01	-9.9%	11.9%	26.47
					MM Group for Industry And International Trade	6.47	-6.2%	-17.5%	21.07
					Egyptian for Tourism Resorts	1.82	-5.9%	27.9%	8.90
					Speed Medical	1.77	-5.1%	8.5%	26.81
					Fawry For Banking TechnologyAnd Electronic Payment	14.19	-4.8%	-45.7%	30.09
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	2.07	14.01	0.0%	1.39	Commercial International Bank (Egypt)	43.01	43.01	0.0%	121.14
Speed Medical	1.77	8.78	0.0%	26.81	Medinet Nasr Housing	2.67	3.32	0.0%	12.54
Raya Holding for Financial Investments	2.35	5.51	0.0%	0.43	Misr Fertilizers Production - Mopco	89.88	2.67	0.0%	6.56
Pioneers Holding	5.51	1.93	0.0%	11.05	Sidi Kerir Petrochemicals	8.78	2.35	0.0%	5.50
Palm Hills Development	1.93	8.73	0.0%	0.76	T M G Holding	7.36	1.77	0.0%	8.67

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Maruti Suzuki India	7400.00	6.4%	-3.3%	19263.594	Hcl Technologies	1299.00	-4.4%	37.3%	10053.26
Mahindra & Mahindra	813.00	4.3%	12.8%	7374.24	Tech Mahindra	1465.00	-3.3%	50.5%	4025.00
Tata Motors	331.00	4.1%	80.0%	18569.43	Wipro	654.65	-3.2%	69.5%	5528.36
ONGC	139.95	2.8%	50.4%	4767.68	Divi's Laboratories Limited	4944.00	-3.2%	28.7%	2749.19
Hero Motocorp	2911.25	2.8%	-6.4%	3442.39	Bajaj Finserv	18050.00	-2.6%	102.7%	7432.25
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Reliance Industries	2527.00	2529.90	-0.1%	17815.10	Hero Motocorp	2911.25	2636.00	10.4%	3442.39
NTPC	127.55	127.80	-0.2%	1069.80	Dr Reddys Lab	4798.00	4135.00	16.0%	1077.65
ONGC	139.95	140.75	-0.6%	4767.68	Maruti Suzuki India	7400.00	6270.15	18.0%	19263.59
Icici Bank	730.00	734.80	-0.7%	5614.28	Britannia Inds.	4009.90	3317.30	20.9%	999.79
Grasim Industries	1646.70	1658.00	-0.7%	1489.38	Nestle India Limited	19624.00	15175.00	29.3%	905.50

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	9.80	7.7%	20.1%	0.02	Bamburi Cement Limited	37.75	-0.7%	-0.3%	0.03
WPP Scangroup Plc	5.58	3.3%	-7.0%	0.40	Kenya Power & Lighting Limited	1.70	-0.6%	-0.6%	1.58
Centum Investment Company Plc	17.35	1.8%	8.1%	1.79	KCB Group Plc	47.00	-0.2%	23.4%	25.87
NCBA Group Plc	27.40	1.3%	2.4%	0.43					
Absa Bank Kenya	10.60	0.5%	9.7%	32.48					
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	25.05	26.50	-5.5%	0.46	Standard Chartered Bank Kenya Ltd	130.00	127.00	2.4%	12.90
NCBA Group Plc	27.40	29.00	-5.5%	0.43	Diamond Trust Bank Limited	63.75	57.50	10.9%	0.17
The Cooperative Bank of Kenya Ltd	13.25	14.05	-5.7%	0.94	Total Kenya Ltd	24.75	21.50	15.1%	0.00
Absa Bank Kenya	10.60	11.35	-6.6%	32.48	East African Breweries Limited	174.00	148.00	17.6%	0.66
Stanbic Holdings	92.00	99.00	-7.1%	1.38	The Cooperative Bank of Kenya Ltd	13.25	11.05	19.9%	0.94

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
SABIC Agri-Nutrients Co	169.80	6.7%	110.7%	265.75	Al Hassan Ghazi Ibrahim Shaker Co.	26.70	-4.3%	65.6%	89.63
Leejam Sports Co.	103.80	5.9%	34.3%	69.14	Wataniya Insurance	49.70	-3.5%	8.0%	25.64
Saudi Kayan Petrochemical	20.92	4.8%	46.3%	726.43	Tourism Enterprise	76.00	-2.9%	38.2%	48.21
Sahara International Petrochemical Co.	42.55	4.7%	145.7%	266.72	Saudi Industrial Export Co.	120.40	-2.9%	7.9%	28.27
Saudi Re for Cooperative Reinsurance Co.	18.82	4.4%	24.5%	47.05	Arriyadh Development Co.	27.60	-2.8%	60.7%	36.13
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	64.70	64.70	0.0%	8.11	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.20	60.20	0.0%	115.03	Savola Group	37.45	36.60	2.3%	58.80
Zamil Industrial Investment Co.	38.55	38.55	0.0%	17.04	BinDawood Holding Co.	108.60	105.60	2.8%	23.00
United International Transportation Co.	48.85	48.85	0.0%	23.04	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	146.20	146.20	0.0%	18.99	Saudia Dairy and Foodstuff Co.	164.00	139.00	18.0%	2.41

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Investec Plc	6445.00	6.5%	75.9%	10217.92	Sibanye Stillwater	4700.00	-5.1%	-21.7%	140670.11
Sasol Limited	26282.00	5.5%	96.2%	88036.76	Impala Platinum	17076.00	-4.6%	-15.4%	97322.53
Investec Ltd	6390.00	5.4%	69.7%	9097.29	Shoprite Limited	18228.00	-4.2%	30.2%	32359.46
RMB Holdings Ltd	154.00	4.1%	85.2%	1595.72	Northam Platinum	16938.00	-4.2%	-19.2%	22139.90
Aspen Phmcrr.Hdg.	25975.00	3.9%	107.2%	66148.84	Clicks Group	28815.00	-3.6%	14.0%	32548.07
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)
Investec Plc	6445.00	6445.00	0.0%	10217.92	Gold Fields	12256.00	11726.00	4.5%	24634.43
Aspen Phmcrr.Hdg.	25975.00	25975.00	0.0%	66148.84	Sibanye Stillwater	4700.00	4451.00	5.6%	140670.11
Investec Ltd	6390.00	6411.00	-0.3%	9097.29	Prosus (JSE)	122325.00	114101.00	7.2%	202499.50
Vodacom Group	15094.00	15144.00	-0.3%	38354.20	Anglogold Ashanti	22898.00	21356.00	7.2%	31536.13
RMB Holdings Ltd	154.00	155.00	-0.6%	1595.72	Brit.Amer.Tobacco	54787.00	50757.00	7.9%	38083.59

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietjet Aviation	129000.00	3.2%	44.1%	156.788.09	Masan Group Corp	135000.00	-5.2%	53.2%	169065.31
Vietnam National Petroleum Group	50100.00	0.2%	-6.3%	75573.89	Saigon Securities	40000.00	-4.3%	90.9%	446916.28
					BaoViet Holdings	56500.00	-3.9%	-14.4%	118516.62
					Tien Phong Commercial Joint Stock Bank	40000.00	-3.9%	27.0%	250849.34
					Vietnam Rubber Group JSC	35600.00	-3.8%	18.9%	143071.90
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%	641680.69	Military Commercial Bank	28000.00	28000.00	0.0%	264.660.79
Vietjet Aviation	129000.00	129000.00	0.0%	156.788.09	Vietnam National Petroleum Group	50100.00	50100.00	0.0%	75573.89
Vingroup JSC	86100.00	86100.00	0.0%	258928.08	PetroVietnam Power Corp	11550.00	11550.00	0.0%	110.139.88
Techcombank	49500.00	49500.00	0.0%	344849.34	Sai Gon Thuong Tin Commercial	26500.00	26500.00	0.0%	281.157.53
Phu Nhuan Jewelry	91000.00	91000.00	0.0%	42486.27	Tien Phong Commercial Joint Stock Bank	40000.00	40000.00	0.0%	250849.34

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