

Daily Market Report

29 September 2021

JSE

JSE All-Share Index declined by 0.64% to close at 63,784.41 points on Tuesday, as the Industrial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 183.17 points, up by 0.27% on Tuesday with Sicom Côte d'Ivoire and Uniwax Côte d'Ivoire being the top gainers.

NSE

NSE All-Share inched down by 0.01% to close at 38,858.99 points on Tuesday, as the Insurance and Banking sectors recorded losses.

EGX

EGX 30 Index decreased by 0.47% and closed at 10,446.78 points on Tuesday, as the market lost LE 10.97 billion of market cap, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 990.48 points on Tuesday, as it increased by 0.26%.

African Markets

Nigeria: NSE 30 Index inched up by 0.03% and closed at 1,610.96 points on Tuesday. Flour Mills and United Capital were the top gainers.

Egypt: EGX 30 Index decreased by 0.47% and closed at 10,446.78 points on Tuesday, as the market lost LE 10.97 billion of market cap, amid Egyptian selling.

Kenya: NSE 20 Index decreased by 0.37% and closed at 2,047.82 points on Tuesday. NCBA Group and Nation Media Group were the top losers.

South Africa: JSE Top 40 Index decreased by 0.56% to close at 57,462.19 points on Tuesday, as the Industrial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange

▼ 0.64%

BRVM

Bourse Régionale des Valeurs Mobilières

▲ 0.27%

NSE

Nigerian Stock Exchange

▼ 0.01%

EGX

Egyptian Stock Exchange

▼ 0.47%

ESG

Casablanca Stock Exchange

▲ 0.26%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.77
INTERBANK RATES	
OBB	13.00 ▼
Overnight	13.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General increased marginally by 0.06% to close at 7,756.31 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index increased by 0.41% to close at 412.49 points.

Vietnam: VN-30 Index rose by 0.83% to close at 1,451.12 points on Tuesday, as the blue-chip companies recorded losses. MSCI Vietnam climbed 1.07% to close at 1018.47 points.

Saudi Arabia: Tadawul All Share Index was up by 0.12% to close at 11,382.41 points on Tuesday, as Energy, Materials, Capital Goods, and Commercial & Professional services sectors recorded gains. MSCI Saudi Arabia increased by 0.31% to close 1,552.97 points.

India: Nifty 50 market declined by 0.60% to close at 17,748.60 points on Tuesday, as Financial, Industrial, and IT sectors recorded losses. MSCI India fell 0.69% to close at 2,054.51 points.

News

Nigeria:

Petrol landing cost now N278, says MOMAN, crude reaches \$80
Reps pass 2022-2024 MTEF, approve N4.89tn new borrowings
NEXIM votes N36bn for SMEs' export business in 36 states

Kenya:

Kenya Holds Rate at Decade-Low as Inflation Seen in Target
Inter-bank lending rate hits 21-month high on tight cash
CBK forecasts high cost of living ahead as inflation persists

Abu Dhabi:

Dana Gas awarded \$607.5m in case against Iran's state oil producer
Abu Dhabi extends electricity tariffs incentive programme to SMEs
IHC unit Alpha Dhabi acquires 95% stake in Emirates Gateway

Saudi Arabia:

Saudi Arabia to borrow extra \$6bn; plans green bonds:
Saudi Petrochem, SIIG sign non-binding agreement on proposed merger
Saudi's MAHARAH subsidiary signs MoU to acquire stake in medical company

Egypt:

NBE, Banque Misr offer syndicated loan worth EGP 2.5bn to Palm Hills-affiliated co
Chemical Industries Export Council targets to increase exports to African market
AmCham, IFC to promote women's economic empowerment, stimulate growth

South Africa:

SA has first quarterly primary surplus in three years
Relief funding of over R1bn already approved for unrest-hit firms
PPC secures R2.1bn in new facilities from its SA lenders

India:

Sebi okays e-gold receipt trades, allows silver ETFs
Sebi makes it easier to delist cos after acquiring over 75%
BPCL to invest Rs 1 lakh cr to become future-ready

Vietnam:

MoIT to minimise new coal-fired power plants
Reference exchange rate up 10 VND
Thái Bình Province makes breakthrough in attracting investment

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,756.31	0.1%	-0.9%	0.9%	53.7%	AED/USD	3.67	0.0%	0.0%
Egypt	10,446.78	-0.5%	-1.8%	-6.3%	-3.7%	EGP/USD	15.71	0.0%	-0.1%
India	17,748.60	-0.6%	-0.6%	3.6%	26.9%	INR/USD	74.05	0.3%	1.3%
Kenya	2,047.82	-0.4%	0.4%	1.3%	9.6%	KES/USD	110.50	0.1%	1.2%
Nigeria	1,610.96	0.03%	-0.4%	-0.4%	-1.8%	NGN/USD	411.50	-0.5%	4.2%
Saudi Arabia	11,382.41	0.1%	1.0%	0.6%	31.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	57,462.19	-0.6%	-0.3%	-5.9%	5.7%	ZAR/USD	15.10	0.9%	2.8%
Vietnam	1,451.12	0.8%	-0.6%	1.6%	35.5%	VND/USD	22,762.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	660.45	0.2%	-0.3%	0.6%	15.5%	Brent Crude (\$)	79.09	-0.6%	52.7%
MSCI Frontier 100	1,501.53	0.4%	-0.1%	1.2%	19.4%	Gold (\$)	1,737.50	-0.8%	-8.3%
MSCI Emerging	1,260.89	-0.5%	-0.3%	-3.7%	-2.4%	Copper (\$)	9,269.00	-1.0%	19.4%
MSCI World (USD)	3,032.70	-2.0%	-2.3%	-3.5%	12.7%	Coffee (\$)	174.97	0.2%	46.8%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Wema	0.82	5.1%	18.8%	6.76	Axamansard	2.70	-9.7%	157.1%	19.15
Flour Mills	29.90	1.9%	15.0%	26.33	FCMB	2.90	-3.3%	-12.9%	1.34
United Capital PLC	8.70	1.8%	108.6%	27.76	Access	9.10	-1.1%	7.7%	36.03
Guaranty	27.70	1.5%	-14.4%	53.98	Zenith	23.30	-0.6%	-6.0%	134.41
Transnational Corporation	0.93	1.1%	3.3%	8.74					
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%	0.00	UBN	5.00	4.65	7.5%	0.45
Total	192.00	192.00	0.0%	64.66	Unilever	13.20	10.50	25.7%	2.41
Seplat Petroleum	710.00	710.00	0.0%	10.63	Cadbury	8.00	6.30	27.0%	41.42
Okomu Oil	110.00	110.00	0.0%	67.54	Cap	19.60	15.25	28.5%	5.97
Julius Berger	27.00	27.00	0.0%	1.02	Sterling	1.47	1.13	30.1%	8.14

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Gulf Cement	0.79	11.1%	-5.8%	0.18	Al Qudra Holding	3.51	-6.7%	219.1%	3.38
Abu Dhabi National Takaful	6.60	10.0%	69.2%	0.08	RAK Co. for White Cement & Construction	1.06	-6.2%	24.9%	0.03
National Takaful Company	0.88	8.6%	-12.0%	0.03	Response Plus Holding	14.00	-6.0%	12.0%	7.56
Sharjah Cement	0.64	3.2%	-15.8%	0.06	Zee Store	38.50	-4.7%	266.7%	12.40
National Marine Dredging	14.40	2.9%	139.6%	26.88	Palms Sports	14.30	-4.5%	8.3%	8.36
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£)
Abou Kir Fertilizers	20.00	2.7%	-3.3%	219.61	MM Group for Industry And International Trade	6.25	-3.4%	-20.3%	24.82
Ezz Steel	12.32	2.6%	14.8%	22.92	Fawry For Banking TechnologyAnd Electronic Payment	13.75	-3.1%	-47.4%	20.97
Eastern Company	12.50	2.5%	-4.1%	2.09	Cleopatra Hospital Company	4.50	-3.0%	-5.5%	0.32
GB AUTO	4.29	2.4%	29.2%	27.87	Ibnsina Pharma	3.24	-2.4%	-36.3%	12.51
Telecom Egypt	14.31	2.1%	19.9%	#REF!	Heliopolis Housing	4.93	-2.0%	-19.2%	3.40
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	2.03	14.31	0.0%	1.29	Commercial International Bank	42.78	42.78	0.0%	78.70
Speed Medical	1.75	8.74	0.0%	20.56	Medinet Nasr Housing	2.62	3.24	0.0%	20.03
Raya Holding for Financial Investments	2.35	5.57	0.0%	0.17	Misr Fretilizers Production - Mopco	89.30	2.62	0.0%	6.04
Pioneers Holding	5.57	1.91	0.0%	19.53	Sidi Kerir Petrochemicals	8.74	2.35	0.0%	5.02
Palm Hills Development Company	1.91	8.57	0.0%	2.29	T M G Holding	7.22	1.75	0.0%	3.58

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Power Grid Corp of India	183.80	4.4%	-3.2%	5373.015	Bharti Airtel	695.85	-3.7%	36.5%	15334.41
Coal India	174.10	4.2%	28.5%	7234.50	Tech Mahindra	1412.90	-3.5%	45.2%	5715.52
NTPC	131.60	3.7%	32.5%	4725.18	Bajaj Finance	7536.00	-3.3%	42.3%	11920.35
Sun Pharm.Industries	790.50	3.6%	33.5%	3780.27	Divi's Laboratories	4794.00	-2.8%	24.8%	4933.88
Indian Oil	122.85	3.5%	35.1%	2486.99	Bajaj Finserv	17535.50	-2.8%	96.9%	5712.86
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Kotak Mahindra Bank	2073.00	2077.80	-0.2%	7969.52	Hero Motocorp	2918.10	2636.00	10.7%	2297.65
Titan Company	2133.85	2150.00	-0.8%	1959.59	Maruti Suzuki India	7400.00	6400.00	15.6%	10012.65
Reliance Industries	2545.00	2564.90	-0.8%	21140.94	Dr Reddys Lab	4847.95	4135.00	17.2%	1463.61
Indian Oil	122.85	123.90	-0.8%	2486.99	Britannia Inds.	3999.95	3317.30	20.6%	1425.44
ONGC	142.00	143.60	-1.1%	6559.13	Nestle India Limited	19507.00	15375.00	26.9%	1129.64

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Total Kenya Ltd	25.40	2.6%	5.8%	0.06	NCBA Group Plc	26.70	-2.6%	-0.2%	4.86
Centum Investment Company Plc	17.50	0.9%	9.0%	0.93	Nation Media Group	24.65	-1.6%	59.5%	0.11
Kenya Power & Lighting Limited	1.71	0.6%	0.0%	17.84	Nairobi Securities Exchange Plc	9.66	-1.4%	18.4%	0.05
Equity Group Holdings Plc	50.75	0.5%	38.9%	3.49	The Cooperative Bank of Kenya Ltd	13.10	-1.1%	4.8%	1.53
Bamburi Cement Limited	37.90	0.4%	0.1%	0.19	Safaricom Plc	41.55	-0.7%	21.3%	87.18
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)
The Cooperative Bank of Kenya Ltd	13.10	14.05	-6.8%	1.53	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	7.30
Nation Media Group	24.65	26.50	-7.0%	0.11	Diamond Trust Bank Limited	63.50	57.50	10.4%	0.18
Absa Bank Kenya	10.55	11.35	-7.0%	0.53	East African Breweries Limited	174.00	148.00	17.6%	1.24
Stanbic Holdings	92.00	99.00	-7.1%	0.00	Total Kenya Ltd	25.40	21.50	18.1%	0.06
KCB Group Plc	46.90	50.75	-7.6%	4.16	The Cooperative Bank of Kenya Ltd	13.10	11.05	18.6%	1.53

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Moammar Information Systems Co.	166.20	3.8%	72.8%	66.58	Saudi Industrial Investment Group	38.50	-3.5%	40.5%	252.28
Saudi Arabian Oil Co.	36.35	3.6%	3.9%	1130.30	Nama Chemicals Co.	46.05	-3.2%	38.3%	31.76
AlAhli REIT Fund 1	14.06	3.1%	57.6%	13.19	Ash-Sharqiyah Development Co.	107.20	-2.9%	13.2%	34.43
Saudi Real Estate Co.	23.80	2.6%	57.4%	70.25	Saudi Industrial Export Co.	117.00	-2.8%	4.8%	23.57
SEDCO Capital REIT Fund	13.26	2.5%	41.8%	9.92	Batic Investments and Logistics Co.	42.60	-2.7%	22.1%	34.57
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	64.30	64.30	0.0%	15.40	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.50	60.50	0.0%	97.26	BinDawood Holding Co.	107.20	105.60	1.5%	33.33
Zamil Industrial Investment Co.	39.40	39.40	0.0%	62.57	Savola Group	37.30	36.60	1.9%	53.71
United International Transportation Co.	49.15	49.15	0.0%	65.38	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	144.00	144.00	0.0%	12.81	Saudia Dairy and Foodstuff Co.	163.80	139.00	17.8%	1.08

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Aspen Phmc.R.Hdg.	27446.00	5.7%	118.9%	68145.10	Impala Platinum	16408.00	-3.9%	-18.7%	80940.61
Sasol Limited	27691.00	5.4%	106.8%	124121.39	Mr Price Group	19425.00	-3.2%	13.8%	31119.22
ABSA Group	14705.00	4.1%	22.7%	50851.63	Sibanye Stillwater	4567.00	-2.8%	-23.9%	117097.58
Firststrand Ltd	6296.00	2.8%	23.4%	128590.39	Vodacom Group	14700.00	-2.6%	18.2%	30775.10
Discovery Ltd	13321.00	2.4%	-13.2%	27250.20	Anglo American	51700.00	-2.4%	8.9%	86344.27
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.R.Hdg.	27446.00	27650.00	-0.7%	68145.10	Sibanye Stillwater	4567.00	4451.00	2.6%	117097.58
Firststrand Ltd	6296.00	6354.00	-0.9%	128590.39	Gold Fields	12075.00	11726.00	3.0%	35827.53
Investec Ltd	6473.00	6585.00	-1.7%	15696.77	Prosus	122100.00	114101.00	7.0%	212233.12
RMB Holdings Ltd	153.00	156.00	-1.9%	782.09	Anglogold Ashanti	22871.00	21356.00	7.1%	20410.84
Investec Plc	6425.00	6586.00	-2.4%	11937.24	Brit.Amer.Tobacco	55056.00	50757.00	8.5%	41146.93

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Petrovietnam Gas	95100.00	5.7%	13.3%	422246.52	Saigon Beer Alcohol Beverage	157100.00	-1.2%	-19.4%	20.540.40
BaoViet Holdings	58700.00	3.9%	-11.1%	96331.55	Vietnam Prosperity	66800.00	-0.3%	-46.6%	460923.07
Hoa Phat Group JSC	52600.00	3.5%	72.3%	1842243.97	Ho Chi Minh City Devp	25450.00	-0.2%	7.2%	76956.08
Phu Nhuan Jewelry	93000.00	2.2%	15.9%	70860.26	Vietnam JSC Bank	30950.00	-0.2%	15.6%	207.847.46
Vietnam National Petroleum Group	51100.00	2.0%	-4.5%	114523.44					
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	66800.00	66800.00	0.0%	460923.07	Military Commercial Bank	28000.00	28000.00	0.0%	206.815.48
Vietjet Aviation	129000.00	129000.00	0.0%	108.522.82	Vietnam National Petroleum Group	51100.00	51100.00	0.0%	114523.44
Vingroup JSC	86500.00	86500.00	0.0%	205720.49	PetroVietnam Power Corp	11750.00	11750.00	0.0%	84.661.47
Techcombank	49800.00	49800.00	0.0%	274.512.63	Sai Gon Thuong Tin Commercial	26550.00	26550.00	0.0%	263.103.26
Phu Nhuan Jewelry	93000.00	93000.00	0.0%	70860.26	Tien Phong Commercial Joint Stock Bank	40700.00	40700.00	0.0%	216.531.72

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