

Daily Market Report

30 September 2021

JSE

JSE All-Share Index rose 0.91% to close at 64,363.66 points on Wednesday, as the Industrial and Financial sectors recorded gains.

BRVM

BRVM Composite Index closed at 183.62 points, up by 0.25% on Wednesday with Sicom Côte d'Ivoire and Bollore Transport & Logistics being the top gainers.

NSE

NSE All-Share advanced by 1.89% to close at 39,592.29 points on Wednesday, as the Industrial, Consumer goods and Banking sectors recorded gains.

EGX

EGX 30 Index declined by 0.53% and closed at 10,391.14 points on Wednesday, as the market lost LE 1.85 billion of market cap, amid foreign selling.

ESG

Casablanca ESG 10 Index closed at 991.99 points on Wednesday, as it increased by 0.15%.

African Markets

Nigeria: NSE 30 Index surged by 2.17% and closed at 1,645.98 points on Wednesday. FBNH and Dangote Cement were the top gainers.

Egypt: EGX 30 Index declined by 0.53% and closed at 10,391.14 points on Wednesday, as the market lost LE 1.85 billion of market cap, amid foreign selling.

Kenya: NSE 20 Index fell 0.86% and closed at 2,030.15 points on Wednesday. Nairobi Securities Exchange and NCBA Group were the top losers.

South Africa: JSE Top 40 Index rose 0.97% to close at 58,022.33 points on Wednesday, as the Industrial and Financial sectors recorded gains.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 0.91%
BRVM Bourse Régionale des Valeurs Mobilières	▲ 0.25%
NSE Nigerian Stock Exchange	▲ 1.89%
EGX Egyptian Stock Exchange	▼ 0.53%
ESG Casablanca Stock Exchange	▲ 0.15%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.8
INTERBANK RATES	
OBB	9.50 ▼
Overnight	10.75 ▼

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.33% to close at 7,730.63 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index fell by 0.45% to close at 410.64 points.

Vietnam: VN-30 Index decreased marginally by 0.04% to close at 1,450.52 points on Wednesday, as the blue-chip companies recorded losses. MSCI Vietnam increased by 0.39% to close at 1,022.46 points.

Saudi Arabia: Tadawul All Share Index inched up by 0.01% to close at 11,383.65 points on Wednesday, as gains in the Building & Construction, Agriculture, and Energy & Utilities sectors led shares higher. MSCI Saudi Arabia edged down 0.02% to close 1,552.73 points.

India: Nifty 50 market decreased by 0.21% to close at 17,711.30 points on Wednesday, as losses in the Fast-Moving Consumer Goods, Banking and Capital Goods sectors pushed shares lower. MSCI India was down by 0.15% to close at 2,051.50 points.

News

Nigeria:

FEC approves ₦3.11bn for education, communication projects
Nigeria's oil reserves dropped by 543 million barrels – OPEC
Makinde Presents ₦294.5bn 2022 Budget to Oyo Assembly

Kenya:

CBK sees economy expanding by 6.1pc
Fuel subsidy fund almost depleted, says Treasury
Banks urged to review lending risk assessment

Abu Dhabi:

UAE fuel prices to rise by up to 5.4% in October
UAE-listed Waha Capital eyes controlling stakes in MENA businesses
Abu Dhabi and Dubai luxury home sales rise at fastest pace in five years

Saudi Arabia:

OPEC+ seen sticking to November output plans, despite \$80 oil
Saudi delivery app, Jahez, gets approval to sell shares in IPO
Nayifat Co. to offer 35m shares in IPO

Egypt:

Egypt's EFG Hermes shareholders approve capital raise
EGX Signs MoU with EBA to attract new listings
Egypt's Pioneers Holding requests trading suspension until listing spin-off firms

South Africa:

Rich Nations Pitch \$5 Billion to Fund South Africa Coal Exit
SA's rival unions unite in dispute over gold miner pay
Sizwe, Hosmed get green light to merge, creating SA's 8th-largest medical scheme

India:

Insurance for exporters gets Rs 6k cr support
Piramal acquires DHFL for Rs 34k cr
India's external debt rises 2.1% to \$570 billion

Vietnam:

Viet Nam's 3Q GDP down 6.7%: largest quarterly decline since 2000
VIB, Microsoft team up to boost service speed and innovation
Reference exchange rate continue upward trend

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,730.63	-0.3%	-1.2%	0.6%	53.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,391.14	-0.5%	-2.4%	-6.8%	-4.2%	EGP/USD	15.71	0.0%	-0.1%
India	17,711.30	-0.2%	-0.8%	3.4%	26.7%	INR/USD	74.15	0.1%	1.5%
Kenya	2,030.15	-0.9%	-0.5%	0.5%	8.7%	KES/USD	110.46	0.0%	1.2%
Nigeria	1,645.98	2.2%	1.8%	1.8%	0.4%	NGN/USD	413.75	0.5%	4.8%
Saudi Arabia	11,383.65	0.01%	1.0%	0.6%	31.0%	SAR/USD	3.75	0.0%	0.0%
South Africa	58,022.33	1.0%	0.7%	-4.9%	6.7%	ZAR/USD	15.18	0.5%	3.3%
Vietnam	1,450.52	-0.04%	-0.6%	1.5%	35.5%	VND/USD	22,755.50	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	660.06	-0.1%	-0.4%	0.5%	15.5%	Brent Crude (\$)	78.64	-0.6%	51.8%
MSCI Frontier 100	1,501.03	0.0%	-0.1%	1.2%	19.3%	Gold (\$)	1,722.90	-0.8%	-9.1%
MSCI Emerging	1,251.28	-0.8%	-1.1%	-4.4%	-3.1%	Copper (\$)	9,155.00	-1.2%	17.9%
MSCI World (USD)	3,028.75	-0.1%	-2.4%	-3.6%	12.6%	Coffee (\$)	177.32	1.3%	48.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	8.05	6.6%	12.6%	2050.85	Axamansard	2.43	-10.0%	131.4%	31.83
Dangote Cement	261.00	6.5%	6.6%	307.34	Julius Berger	24.30	-10.0%	36.5%	20.89
Nestle	1489.00	6.4%	-1.1%	412.79	Wema	0.78	-4.9%	13.0%	3.20
Presco	77.00	5.5%	8.5%	23.76	Fidelity	2.44	-0.4%	-3.2%	27.51
United Capital PLC	8.90	2.3%	113.4%	96.39					
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%	0.01	UBN	5.00	4.65	7.5%	0.82
Total	192.00	192.00	0.0%	6.41	Cadbury	8.00	6.30	27.0%	0.18
Seplat Petroleum	710.00	710.00	0.0%	35.87	Cap	19.60	15.25	28.5%	6.22
Okomu Oil	110.00	110.00	0.0%	9.60	Unilever	13.50	10.50	28.6%	39.43
Julius Berger	24.30	24.30	0.0%	20.89	Sterling	1.47	1.13	30.1%	3.87

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Palms Sports	14.88	4.1%	12.7%	13.08	Zee Store	37.04	-3.8%	252.8%	31.59
Emirates Driving Co.	20.60	4.0%	54.4%	0.05	Dana Gas PJSC	1.06	-3.6%	48.5%	19.62
National Takaful Company	0.90	2.3%	-10.0%	0.01	Abu Dhabi National for Building Materials	0.30	-3.2%	15.8%	0.02
Response Plus Holding	14.22	1.6%	13.8%	10.70	Methaq Takaful Ins.	0.83	-2.1%	-4.4%	0.13
Alpha Dhabi Holding	27.06	1.4%	80.4%	73.55	Esg Emirates Stallions Group	8.26	-1.7%	98.6%	10.90
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£)
Alexandria Mineral Oils Company	3.66	7.7%	17.3%	20.25	Eastern Company	12.09	-3.3%	-7.3%	0.56
Ezz Steel	12.73	3.3%	18.6%	11.84	Pioneers Holding	5.42	-2.7%	34.8%	13.34
Fawry For Banking Technology And Electronic Payment	14.09	2.5%	-46.1%	18.96	Credit Agricole Egypt	25.12	-2.7%	-13.4%	3.41
MM Group For Industry And International Trade	6.39	2.2%	-18.5%	20.16	Telecom Egypt	14.07	-1.7%	17.9%	1.31
Tenth Of Ramadan Pharmaceutical Industries & Diagnostic-Rameda	2.06	1.5%	-45.8%	1.96	Commercial International Bank (Egypt)	42.24	-1.3%	-28.6%	46.37
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	2.06	14.07	0.0%	1.96	Commercial International Bank (Egypt)	42.24	42.24	0.0%	46.37
Speed Medical	1.76	8.79	0.0%	20.49	Medinet Nasr Housing	2.60	3.23	0.0%	16.04
Raya Holding For Financial Investments	2.35	5.42	0.0%	0.14	Misr Fertilizers Production - Mopco	88.53	2.60	0.0%	2.28
Pioneers Holding	5.42	1.90	0.0%	13.34	Sidi Kerir Petrochemicals	8.79	2.35	0.0%	6.17
Palm Hills Development Company	1.90	8.59	0.0%	1.37	T M G Holding	7.25	1.76	0.0%	1.00

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
NTPC	140.40	6.4%	41.3%	10579.351	HDFC	2747.35	-2.1%	7.4%	9204.24
Coal India	185.40	6.2%	36.9%	18918.20	Kotak Mahindra Bank	2031.00	-1.8%	1.8%	6972.21
Power Grid Corp Of India	194.40	5.7%	2.4%	7722.42	Asian Paints	3320.00	-1.8%	20.1%	3246.17
Sun Pharm.Industries	810.15	4.5%	36.8%	14865.33	Ultratech Cement	7460.00	-1.7%	41.1%	3666.95
Indian Oil	127.90	4.0%	40.6%	2505.08	Eicher Motors	2840.05	-1.5%	12.2%	1105.20
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	127.90	128.00	-0.1%	2505.08	Hero Motocorp	2883.00	2636.00	9.4%	1771.41
Hindalco Industries	494.90	496.90	-0.4%	4644.77	Maruti Suzuki India	7382.00	6400.00	15.3%	4744.45
Titan Company	2150.00	2167.90	-0.8%	1954.66	Dr Reddys Lab	4885.00	4135.00	18.1%	3199.41
Grasim Industries	1670.00	1684.60	-0.9%	1360.74	Britannia Inds.	3975.00	3317.30	19.8%	1322.79
Power Grid Corp Of India	194.40	196.30	-1.0%	7722.42	Nestle India Limited	19474.00	15375.00	26.7%	904.27

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	1.72	0.6%	0.6%	1.94	Nairobi Securities Exchange Plc	9.04	-6.4%	10.8%	0.45
Safaricom Plc	41.65	0.2%	21.6%	145.60	NCBA Group Plc	25.75	-3.6%	-3.7%	2.58
British American Tobacco Kenya Ltd	446.00	0.1%	23.5%	0.40	Diamond Trust Bank Limited	62.25	-2.0%	-17.0%	1.05
					Nation Media Group	24.35	-1.2%	57.6%	0.23
					East African Breweries Limited	172.00	-1.1%	11.5%	277.92
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)
Absa Bank Kenya	10.55	11.35	-7.0%	2.55	Standard Chartered Bank Kenya Ltd	129.75	127.00	2.2%	3.35
Stanbic Holdings	92.00	99.00	-7.1%	18.69	Diamond Trust Bank Limited	62.25	57.50	8.3%	1.05
The Cooperative Bank of Kenya Ltd	13.05	14.05	-7.1%	6.14	East African Breweries Limited	172.00	148.00	16.2%	277.92
Total Kenya Ltd	25.40	27.50	-7.6%	0.00	The Cooperative Bank of Kenya Ltd	13.05	11.05	18.1%	6.14
Equity Group Holdings Plc	50.75	55.00	-7.7%	15.43	Total Kenya Ltd	25.40	21.50	18.1%	0.00

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Aseer Trading, Tourism and Manufacturing Co.	25.95	10.0%	58.2%	259.10	Al-Rajhi Company for Coop Insurance	94.40	-3.1%	16.7%	26.10
Al Abdullatif Industrial Investment Co.	35.25	4.3%	130.4%	107.88	Middle East Paper Co.	41.30	-2.8%	113.8%	29.20
National Gypsum Co.	49.15	3.3%	75.8%	30.63	Aldrees Petroleum & Transport Svs	72.10	-2.6%	11.1%	25.35
Saudi Arabian Mining Co.	82.50	3.3%	103.7%	94.85	Emaar The Economic City	13.28	-2.4%	44.2%	138.34
Saudi Industrial Investment Group	39.70	3.1%	44.9%	91.03	United Cooperative Assurance Co.	32.30	-2.1%	88.9%	15.35
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%	9.23	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
The Saudi National Bank	60.20	60.20	0.0%	70.50	BinDawood Holding Co.	107.20	105.60	1.5%	8.30
Zamil Industrial Investment Co.	39.15	39.15	0.0%	28.60	Savola Group	37.90	36.60	3.6%	37.43
United International Transportation Co.	49.95	49.95	0.0%	49.18	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	142.20	142.20	0.0%	31.44	Saudia Dairy and Foodstuff Co.	163.80	139.00	17.8%	0.97

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
MTN Group	14290.00	5.0%	137.4%	78446.41	Anglo American Platinum	126752.00	-2.5%	-6.8%	24749.60
Remgro Limited	13567.00	2.6%	41.0%	25845.68	Aspen Phmc.R.Hdg.	27000.00	-1.6%	115.4%	63608.52
Firstrand Ltd	6452.00	2.5%	26.4%	128883.13	Shoprite Limited	17830.00	-1.2%	27.4%	38409.64
ABSA Group	15043.00	2.3%	25.5%	20910.60	Spar Group	19544.00	-1.0%	3.1%	14466.66
Standard Bank Group	14442.00	2.2%	13.6%	40534.69	Mondi	36975.00	-1.0%	7.8%	9382.11
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)
Firstrand Ltd	6452.00	6452.00	0.0%	128883.13	Gold Fields	11979.00	11726.00	2.2%	36243.06
Remgro Limited	13567.00	13605.00	-0.3%	25845.68	Sibanye Stillwater	4558.00	4451.00	2.4%	73290.38
Investec Plc	6528.00	6586.00	-0.9%	6925.91	Anglogold Ashanti	22771.00	21356.00	6.6%	25479.82
MTN Group	14290.00	14471.00	-1.3%	78446.41	Brit.Amer.Tobacco	54696.00	50757.00	7.8%	50666.11
Old Mutual Limited	1650.00	1678.00	-1.7%	20748.98	Prosus	123075.00	114101.00	7.9%	181862.64

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	12200.00	3.8%	-10.3%	381.068.74	Sai Gon Thuong Tin Commercial	25800.00	-2.8%	-20.6%	518715.45
Masan Group Corp	141000.00	3.7%	60.0%	78404.08	Vietnam JSC Bank	30400.00	-1.8%	13.6%	315115.48
Petrovietnam Gas	96800.00	1.8%	15.3%	266650.88	Saigon Securities	40100.00	-1.2%	91.4%	221868.58
Vietnam National Petroleum Group	52000.00	1.8%	-2.8%	114370.77	Vietnam Prosperity	66000.00	-1.2%	-47.2%	435.695.41
Tien Phong Commercial Joint Stock Bank	41400.00	1.7%	31.4%	332,186,30	BaoViet Holdings	58000.00	-1.2%	-12.1%	62159.83
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	66000.00	66000.00	0.0%	435.695.41	Military Commercial Bank	27800.00	27800.00	0.0%	310267.26
Vietjet Aviation	128500.00	128500.00	0.0%	110.056.25	Vietnam National Petroleum Group	52000.00	52000.00	0.0%	114370.77
Vingroup JSC	86700.00	86700.00	0.0%	165.519.03	PetroVietnam Power Corp	12200.00	12200.00	0.0%	381.068.74
Techcombank	49400.00	49400.00	0.0%	279718.96	Sai Gon Thuong Tin Commercial	25800.00	25800.00	0.0%	518715.45
Phu Nhuan Jewelry	93300.00	93300.00	0.0%	33913.42	Tien Phong Commercial Joint Stock Bank	41400.00	41400.00	0.0%	332,186,30

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