

Daily Market Report

11 October 2021

JSE

JSE All-Share Index was up by 0.13% to close at 65,242.61 points on Friday, as Resources sectors recorded gains.

BRVM

BRVM Composite Index closed at 186.00 points, down by 0.13% on Friday with Sicom Côte d'Ivoire and Ecobank Côte d'Ivoire being the top losers.

NSE

NSE All-Share increased by 0.10% to close at 40,868.36 points on Friday, as the Insurance and Banking Sectors recorded gains.

EGX

EGX 30 Index jumped by 1.20% and closed at 10,662.96 points on Sunday, as the market gained LE 2.8 billion of market cap, amid Egyptian and Arab buying.

ESG

Casablanca ESG 10 Index closed at 991.70 points on Friday, as it rose by 0.71%.

African Markets

Nigeria: NSE 30 Index increased by 0.19% and closed at 1,692.85 points on Friday. Ecobank and Sterling were the top gainers.

Egypt: EGX 30 Index jumped by 1.20% and closed at 10,662.96 points on Sunday, as the market gained LE 2.8 billion of market cap, amid Egyptian and Arab buying.

Kenya: NSE 20 Index declined by 0.46% and closed at 1,992.92 points on Friday. Stanbic Holdings and Diamond Trust Bank were the top losers.

South Africa: JSE Top 40 Index increased by 0.20% to close at 58,839.09 points on Friday, as the Resources sectors recorded gains.

Capital Markets

JSE
Johannesburg Stock Exchange ▲ 0.13%

BRVM
Bourse Régionale des Valeurs Mobilières ▼ 0.13%

NSE
Nigerian Stock Exchange ▲ 0.10%

EGX
Egyptian Stock Exchange ▲ 1.20%

ESG
Casablanca Stock Exchange ▲ 0.71%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.81

INTERBANK RATES

OBB	14.00 ▲
Overnight	14.50 ▲

Other Emerging Markets

Abu Dhabi: ADX General increased 0.27% to close at 7,730.02 points on Sunday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index remained unchanged at 403.84 points.

Vietnam: VN-30 Index rose by 0.94% to close at 1,476.54 points on Friday, as the blue-chip companies recorded gains. MSCI Vietnam increased by 0.19% to close at 1,047.37 points.

Saudi Arabia: Tadawul All Share Index decreased by 0.22% to close at 11,566.02 points on Sunday, as gains in the Media & Publishing, Energy & Utilities and Financial Services sectors led shares lower. MSCI Saudi Arabia increased 0.24% to close 1,596.06 points.

India: Nifty 50 market increased by 0.59% to close at 17,895.20 points on Friday, as gains in the IT, Technology and Carbon sectors propelled shares higher. MSCI India increased by 0.54% to close at 2,081.15 points.

News

Nigeria:

Budget: Finance, power projects get lion's shares of N1.16tn loans
Nigeria Withholds Assent as 136 Countries Ratify 15% Corporate Tax
Osinbajo rejects defunding of gas projects

Kenya:

Kenya & Barbados Sign Bilateral Trade Agreements
Centum shuts down services unit, lays off staff
Pension schemes invest Sh730m in Acorn Reits

Abu Dhabi:

Dubai announces public-private partnership projects worth nearly \$25 bn
Microsoft for Startups' GrowthX Accelerator programme kicks off in UAE
UAE's Mubadala-backed coaching start-up BetterUp raises \$300mln

Saudi Arabia:

Arabian Contracting Services IPO price range set at \$24-\$26.6 per share
Saudi Advanced net profit jumps 40% on higher polypropylene sales prices
Saudi dairy giant Almarai's third-quarter profit falls 34%

Egypt:

Egypt's annual inflation records 8% during September, hikes 1.6% monthly
Egypt's annual core inflation records 4.8% in September: CBE
Egypt, AfDB prepare for 2022-26 country strategy in Presence of 17 national entities

South Africa:

SA forex reserves slip in September as demand for gold slows
Santam to finalise outstanding CBI claims soon following court ruling
Bounceback on the cards for manufacturing and retail sales

India:

RIL boosts solar business with Rs 9k crore deals
4 more PSUs BPCL, SCI, BEML, NINL will be privatised by Q4 along with LIC IPO
RBI retains GDP Forecast at 9.5%, revises inflation estimates down at 5.3%

Vietnam:

State Treasury purchases 150 million USD from commercial banks
Vietnamese currency forecast to strengthen against US dollar in 2021
Agro-forestry-fisheries export value up 17.7 percent

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,730.02	0.3%	0.3%	0.4%	53.2%	AED/USD	3.67	0.0%	0.0%
Egypt	10,662.96	1.2%	1.2%	1.4%	-1.7%	EGP/USD	15.70	0.1%	-0.2%
India	17,895.20	0.6%	0.0%	1.6%	28.0%	INR/USD	74.99	0.2%	2.6%
Kenya	1,992.92	-0.5%	0.0%	-1.9%	6.7%	KES/USD	110.75	0.0%	1.4%
Nigeria	1,692.85	0.2%	0.0%	1.1%	3.2%	NGN/USD	413.09	0.6%	4.6%
Saudi Arabia	11,566.02	-0.2%	-0.2%	0.6%	33.1%	SAR/USD	3.75	0.0%	0.0%
South Africa	58,839.09	0.2%	0.0%	1.7%	8.2%	ZAR/USD	14.93	-0.2%	1.6%
Vietnam	1,476.54	0.9%	0.0%	1.6%	37.9%	VND/USD	22,763.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	669.19	0.3%	0.0%	1.0%	17.1%	Brent Crude (\$)	82.39	0.5%	59.1%
MSCI Frontier 100	1,526.03	0.2%	0.0%	1.1%	21.3%	Gold (\$)	1,757.40	-0.1%	-7.3%
MSCI Emerging	1,257.04	0.3%	0.0%	0.3%	-2.7%	Copper (\$)	9,361.00	0.9%	20.5%
MSCI World (USD)	3,043.74	-0.1%	0.0%	1.2%	13.1%	Coffee (\$)	178.91	1.7%	50.1%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Ecobank	6.30	5.0%	5.0%	72.02	Wema	0.75	-2.6%	8.7%	6.12
Sterling	1.53	4.8%	-25.0%	4.65	Axamansard	2.31	-2.1%	120.0%	8.15
UACN	10.65	4.4%	46.9%	29.63	FBNH	9.80	-2.0%	37.1%	1542.46
Transnational Corporation	0.97	3.2%	7.8%	12.14	United Capital PLC	9.05	-1.1%	117.0%	12.74
UBN	5.00	2.0%	-6.5%	1.98	Fidelity	2.61	-0.4%	3.6%	35.87
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	10.65	10.65	0.0%	29.63	UBN	5.00	4.65	7.5%	1.98
Transcorp Hotels	5.43	5.43	0.0%	0.0	Unilever	13.20	10.50	25.7%	3.47
Total	192.00	192.00	0.0%	5.75	Cadbury	8.00	6.30	27.0%	0.10
Seplat Petroleum	710.00	710.00	0.0%	38.10	Cap	19.45	15.25	27.5%	1.13
Presco	85.00	85.00	0.0%	13.66	Sterling	1.53	1.13	35.4%	4.65

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Al Qudra Holding	4.99	15.0%	353.6%	34.56	National Takaful Company	0.76	-9.9%	-23.8%	0.00
Abu Dhabi National for Building Materials	0.30	12.1%	14.7%	0.00	Zee Store	32.20	-4.7%	206.7%	25.16
Eshraq Investments	0.32	5.0%	-0.9%	2.73	Abu Dhabi National Takaful	6.50	-3.0%	66.7%	0.08
Manazel PJSC	0.48	4.2%	36.0%	8.70	Abu Dhabi Aviation	4.40	-2.9%	21.5%	2.91
Sudatel Telecom	0.36	4.0%	-12.3%	0.00	Dana Gas PJSC	1.05	-2.8%	47.1%	4.71
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	National Bank of Fujairah	4.77	4.77	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Insurance House	0.79	0.79	0.0%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	The National Investor PRJSC	0.60	0.60	0.0%	0.00
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	Al Khazna Insurance Co	1.00	0.00	0.0%	0.00
The National Investor PRJSC	0.60	0.60	0.0%	0.00	Umm Al Qaiwain General Inv.	0.86	0.85	1.2%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Egyptian Kuwaiti Holding-EGP	19.00	5.6%	7.0%	86.77	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	1.93	-2.4%	-49.2%	1.70
Alexandria Mineral Oils Company	4.00	2.8%	28.2%	22.80	GB AUTO	4.01	-2.0%	20.8%	3.39
Misr Fertilizers Production - Mopco	93.00	2.8%	58.2%	12.23	Orascom Development Egypt	4.80	-1.4%	-2.0%	3.92
Sidi Kerir Petrochemicals	9.24	2.0%	-0.8%	24.97	Oriental Weavers	8.55	-1.4%	24.8%	1.93
Commercial International Bank	43.81	1.9%	-26.0%	152.08	MM Group For Industry And International Trade	6.50	-0.9%	-17.1%	17.47
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	1.93	13.17	0.0%	1.70	Commercial International Bank	43.81	43.81	0.0%	152.08
Speed Medical	1.78	9.24	0.0%	5.97	Medinet Nasr Housing	2.63	3.23	0.0%	5.75
Palm Hills Development Company	1.92	8.55	0.0%	3.12	Misr Fertilizers Production - Mopco	93.00	2.63	0.0%	12.23
Oriental Weavers	8.55	4.80	0.0%	1.93	Sidi Kerir Petrochemicals	9.24	2.70	0.0%	24.97
MM Group For Industry And International Trade	6.50	93.00	0.0%	17.47	T M G Holding	7.29	1.78	0.0%	3.67

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Reliance Industries	2669.20	3.8%	34.4%	19237.022	Coal India	187.70	-1.6%	38.6%	5437.75
Wipro	661.95	3.0%	71.4%	7280.08	SBI Life Insurance	1196.65	-1.5%	32.3%	2010.39
Infosys	1723.85	1.9%	37.3%	8147.26	NTPC	140.95	-1.3%	41.9%	1511.62
Tata Motors	382.80	1.7%	108.2%	36222.17	Maruti Suzuki India	7409.30	-1.1%	-3.1%	4714.84
Tech Mahindra	1440.00	1.6%	48.0%	3831.63	Shree Cement	27755.00	-1.1%	15.6%	835.07
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	2669.20	2684.40	-0.6%	19237.02	Hero Motocorp	2842.00	2636.00	7.8%	855.33
Tata Consultancy Svs.	3943.00	3989.90	-1.2%	11584.27	Maruti Suzuki India	7409.30	6400.00	15.8%	4714.84
Indusind Bank	1172.75	1189.35	-1.4%	2745.02	Britannia Inds.	3884.00	3317.30	17.1%	1230.19
Hdfc Bank	1607.00	1641.00	-2.1%	5839.96	Dr Reddys Lab	4855.00	4135.00	17.4%	1694.05
Sun Pharm. Industries	819.90	838.90	-2.3%	2271.42	Nestle India Limited	19025.00	15375.00	23.7%	1660.22

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
Kengen Limited	4.78	2.6%	1.5%	5.50	Stanbic Holdings	86.25	-7.8%	1.5%	0.01
Kenya Power & Lighting Limited	1.79	1.1%	4.7%	1.14	Diamond Trust Bank Limited	60.50	-2.8%	-19.3%	0.47
Kenya Reinsurance Corporation Ltd	2.50	0.8%	7.8%	0.23	Safaricom Plc	41.65	-1.7%	21.6%	924.39
KCB Group Plc	46.10	0.4%	21.0%	35.38	WPP Scangroup Plc	4.93	-1.4%	-17.8%	0.10
Bamburi Cement Limited	37.05	0.4%	-2.1%	0.28	Standard Chartered Bank Kenya Ltd	129.25	-0.6%	-10.4%	1.16
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)
Centum Investment Company Plc	17.40	18.00	-3.3%	0.09	East African Breweries Limited	164.75	162.00	1.7%	1.66
Kenya Power & Lighting Limited	1.79	1.86	-3.8%	1.14	Standard Chartered Bank Kenya Ltd	129.25	127.00	1.8%	1.16
The Cooperative Bank of Kenya Ltd	13.15	14.00	-6.1%	2.36	British American Tobacco Kenya Ltd	445.50	429.00	3.8%	2.05
Safaricom Plc	41.65	45.25	-8.0%	924.39	NCBA Group Plc	25.25	24.25	4.1%	1.25
British American Tobacco Kenya Ltd	445.50	485.00	-8.1%	2.05	Diamond Trust Bank Limited	60.50	57.50	5.2%	0.47

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Methanol Chemicals Co.	36.80	3.2%	185.3%	229.27	Naseej International Trading	108.60	-9.7%	9.7%	242.66
Al Rajhi Bank	134.20	2.9%	82.3%	546.46	Saudi Fisheries Co.	55.60	-6.1%	1.3%	211.38
Saudi Ceramic Co.	61.70	2.7%	71.6%	29.11	Wataniya Insurance	44.20	-6.0%	-3.9%	14.44
Al Hammadi Company for Development and Investment	39.15	2.2%	35.5%	24.97	Takween Advanced Industries Co.	19.80	-5.8%	41.4%	24.82
Yanbu National Petrochemical Co.	73.50	2.1%	15.0%	110.22	Saudi Enaya Coop Insurance Co.	35.65	-5.6%	3.3%	14.01
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)
The Saudi National Bank	64.40	64.40	0.0%	137.84	BinDawood Holding Co.	104.40	104.40	0.0%	13.31
Zamil Industrial Investment Co.	35.75	35.75	0.0%	21.28	Savola Group	36.90	36.60	0.8%	32.07
Yanbu National Petrochemical Co.	73.50	73.50	0.0%	110.22	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
United Electronics Co.	140.60	140.60	0.0%	14.48	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Cooperative Assurance Co.	33.10	33.10	0.0%	18.79	Tanmiah Food Co.	97.00	87.10	11.4%	42.81

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum Holdings	20249.00	9.3%	0.3%	7.62	Sanlam Ltd	6130.00	-3.1%	4.3%	8.49
RMB Holdings	167.00	4.4%	100.8%	7.49	Bidvest Group Ltd	18688.00	-2.8%	19.0%	0.90
Growthpoint Properties	1422.00	3.0%	13.1%	12.05	Absa	14340.00	-2.6%	19.6%	2.60
MTN Group	14300.00	1.5%	137.6%	4.52	Firststrand	6097.00	-2.5%	19.5%	14.47
AngloGold Ashanti	26390.00	1.2%	-23.0%	1.31	Standard Bank Grp	13739.00	-2.4%	8.1%	4.11
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)
RMB Holdings Ltd	167.00	167.00	0.0%	7.49	Brit.Amer.Tobacco	51425.00	50757.00	1.3%	0.80
MTN Group	14300.00	14471.00	-1.2%	4.52	Prosus	123868.00	114101.00	8.6%	0.90
Bid Corporation	33001.00	33793.00	-2.3%	0.50	Sibanye Stillwater	4863.00	4479.00	8.6%	24.79
Old Mutual Limited	1639.00	1701.00	-3.6%	13.23	Spar Group	18975.00	17111.00	10.9%	1.00
Remgro Limited	13600.00	14187.00	-4.1%	1.01	Gold Fields	13045.00	11726.00	11.2%	2.26

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
FPT Corp	98900.00	4.9%	94.2%	811.130.61	PetroVietnam Power Corp	12450.00	-1.6%	-8.5%	230374.66
Khang Dien House Trading & Investment	43550.00	2.8%	63.5%	269421.47	Vietnam Rubber Group JSC	37650.00	-1.4%	25.7%	130200.90
Masan Group Corp	145500.00	2.7%	65.1%	145.389.30	BaoViet Holdings	61200.00	-1.1%	-7.3%	103869.98
Saigon Beer Alcohol Beverage Corp.	162700.00	2.6%	-16.6%	23822.00	Vincom Retail	29150.00	-0.5%	-73.0%	94.041.14
Phu Nhuan Jewelry	99500.00	2.6%	24.0%	63.564.98	Vietnam National Petroleum Group	53900.00	-0.2%	0.8%	52.545.36
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₫)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₫)
Vietjet Aviation	128900.00	128900.00	0.0%	92.892.06	Military Commercial Bank	27700.00	27700.00	0.0%	222952.28
Vingroup JSC	89300.00	89300.00	0.0%	115842.15	Vietnam National Petroleum Group	53900.00	53900.00	0.0%	52.545.36
Techcombank	50700.00	50700.00	0.0%	385.622.67	PetroVietnam Power Corp	12450.00	12450.00	0.0%	230374.66
Phu Nhuan Jewelry	99500.00	99500.00	0.0%	63.564.98	Sai Gon Thuong Tin Commercial	25700.00	25700.00	0.0%	239985.52
No Va Land Invest	104500.00	104500.00	0.0%	159.239.99	Tien Phong Commercial Joint Stock Bank	42150.00	42150.00	0.0%	131996.27

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