

Daily Market Report

13 October 2021

JSE

JSE All-Share Index decreased by 0.17% to close at 65,988.13 points on Tuesday, as the Financial and Resources sectors recorded losses.

BRVM

BRVM Composite Index closed at 187.61 points, up by 0.39% on Tuesday with CFAO Motors Côte d'Ivoire and Servair Abidjan Côte d'Ivoire being the top gainers.

NSE

NSE All-Share increased by 0.45% to close at 40,896.96 points on Tuesday, as the Insurance, Banking, Consumer goods and Industrial sectors recorded gains.

EGX

EGX 30 Index increased by 0.65% and closed at 10,783.92 points on Tuesday, as the market gained LE 2.7 billion of market cap, amid Arab buying.

ESG

Casablanca ESG 10 Index closed at 986.90 points on Tuesday, as it inched up by 0.04%.

African Markets

Nigeria: NSE 30 Index increased by 0.57% and closed at 1,693.58 points on Tuesday. FBNH and Ecobank were the top gainers.

Egypt: EGX 30 Index increased by 0.65% and closed at 10,783.92 points on Tuesday, as the market gained LE 2.7 billion of market cap, amid Arab buying.

Kenya: NSE 20 Index decreased by 0.58% and closed at 1,981.44 points on Tuesday. Total Kenya and Bamburi Cement were the top losers.

South Africa: JSE Top 40 Index decreased by 0.27% to close at 59,501.73 points on Tuesday, as the Financial and Resources sectors recorded losses.

Capital Markets

JSE

Johannesburg Stock Exchange ▼ 0.17%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.39%

NSE

Nigerian Stock Exchange ▲ 0.45%

EGX

Egyptian Stock Exchange ▲ 0.65%

ESG

Casablanca Stock Exchange ▲ 0.04%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.87
INTERBANK RATES	
OBB	5.00 ▼
Overnight	5.50 ▼

Other Emerging Markets

Abu Dhabi: ADX General inched up by 0.06% to close at 7,786.89 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index rose by 0.64% to close at 409.17 points.

Vietnam: VN-30 Index decreased marginally by 0.05% to close at 1,509.57 points on Tuesday, as the blue-chip companies recorded losses. MSCI Vietnam inched down by 0.01% to close at 1,066.05 points.

Saudi Arabia: Tadawul All Share Index increased by 0.27% to close at 11,542.88 points on Tuesday, as gains in the Financial Services, Hotels & Tourism and Cement sectors led shares higher. MSCI Saudi Arabia increased by 0.43% to close at 1,596.14 points.

India: Nifty 50 market increased by 0.26% to close at 17,991.95 points on Tuesday, as gains in the Consumer Durables, Fast Moving Consumer Goods and Metals sectors led shares higher. MSCI India increased by 0.33% to close at 2,090.54 points.

News

Nigeria:

FG to auction N150bn bonds in October
Seplat's Energy Transition Plan for National Growth Gets FG's Endorsement
Q3: Customs Rake in N128.3b in Onne, Harps on Compliance

Kenya:

NCBA Group bucks trend with six new branches
Centum unit gets Sh775m renewable energy loan
Dubai firm inks funding deal for youth in Kenya

Abu Dhabi:

UAE cabinet approves \$78.96bn five-year budget
Abu Dhabi launches Dh5bn IPO fund to help companies list
Abu Dhabi to start SME training programme with Amazon subsidiary

Saudi Arabia:

Saudi SEDCO Capital and Amundi launch two new Shariah equity funds
Saudi lender Nayifat Finance to proceed with IPO, listing on stock exchange
Saudi Research and Media Group completes acquisition of Thmanyah stake

Egypt:

Egypt's trade deficit dips 14.6% to \$2.88B in July
E-Finance announces final price for offering its shares on EGX at LE 13.98
Fawry acquires stake in Sudanese fintech platform in first overseas venture

South Africa:

Pimco, SA reach R3bn UN-backed green energy agreement
Old Mutual to Expand West African Market Share With Acquisitions
South Africa Steel Strike Threatens to Worsen Employment Crisis

India:

Retail inflation eases to 4.35% in September; IIP grows 11.9% in Aug
RIL invests in German co, 3rd solar deal within 3 days
TaMo to raise \$1bn from PE investors for 15% in EV business

Vietnam:

Viet Nam to further develop biotechnology industry by 2030
VinFast's sales up 51.4 per cent in September
Tax cut proposed to stabilise domestic petrol price

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,786.89	0.1%	1.0%	1.1%	54.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,783.92	0.6%	2.3%	2.5%	-0.6%	EGP/USD	15.71	-0.1%	-0.1%
India	17,991.95	0.3%	0.5%	2.1%	28.7%	INR/USD	75.51	0.2%	3.3%
Kenya	1,981.44	-0.6%	-0.6%	-2.4%	6.1%	KES/USD	110.80	0.0%	1.5%
Nigeria	1,693.58	0.6%	0.0%	1.1%	3.3%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,542.88	0.3%	-0.4%	0.4%	32.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,501.73	-0.3%	1.1%	2.8%	9.4%	ZAR/USD	14.97	0.0%	1.9%
Vietnam	1,509.57	-0.05%	2.2%	3.8%	41.0%	VND/USD	22,758.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	672.64	0.5%	0.5%	1.5%	17.7%	Brent Crude (\$)	83.42	-0.3%	61.0%
MSCI Frontier 100	1,534.32	0.4%	0.5%	1.7%	22.0%	Gold (\$)	1,759.30	0.2%	-7.2%
MSCI Emerging	1,253.63	-1.0%	-0.3%	0.04%	-2.9%	Copper (\$)	9,465.00	-0.8%	21.9%
MSCI World (USD)	3,024.72	-0.2%	-0.6%	0.6%	12.4%	Coffee (\$)	181.12	0.1%	51.9%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
FBNH	10.65	9.8%	49.0%	3294.13	International Breweries	4.50	-2.2%	-24.4%	8.29
Ecobank	7.40	7.2%	23.3%	269.21	Sterling	1.46	-2.0%	-28.4%	3.97
Cadbury	8.15	1.9%	-9.4%	2.43	Lafarge Africa	24.10	-1.6%	14.5%	48.28
BUA Cement	65.50	1.8%	-15.3%	47.67	United Capital PLC	9.00	-1.1%	115.8%	31.18
Access	9.60	1.6%	13.6%	64.47	FCMB	3.05	-0.3%	-8.4%	17.75
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
UACN	10.65	10.65	0.0%	12.53	UBN	5.00	4.65	7.5%	6.08
Transcorp Hotels	5.43	5.43	0.0%	0.01	Unilever	13.20	10.50	25.7%	9.97
Total	192.00	192.00	0.0%	19.44	Cap	19.60	15.25	28.5%	43.87
Seplat Petroleum	710.00	710.00	0.0%	71.01	Sterling	1.46	1.13	29.2%	3.97
Presco	85.00	85.00	0.0%	36.81	Cadbury	8.15	6.30	29.4%	2.43

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Esg Emirates Stallions Group P.J.S.C	10.40	14.8%	150.0%	17.32	Ras Al Khaimah Poultry	2.85	-9.8%	96.6%	0.01
Sharjah Islamic Bank	1.81	6.5%	37.1%	31.89	Sharjah Group Co.	2.60	-9.7%	205.9%	0.10
Al Qudra Holding	5.95	3.8%	440.9%	38.48	National Marine Dredging	13.50	-3.6%	124.6%	37.83
RAK Co. for White Cement & Construction	1.11	3.7%	30.7%	0.37	Ras Al Khaimah Cement Investment	3.50	-2.5%	3.2%	47.26
Eshraq Investments	0.32	2.5%	1.6%	10.34	Alpha Dhabi Holding Pjsc	28.02	-2.3%	86.8%	125.53
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)
Insurance House	0.91	0.91	0.0%	0.00	National Bank of Fujairah	4.77	4.77	0.0%	0.00
Al Buhaira Ntl Ins.	1.85	1.85	0.0%	0.00	Umm Al Qaiwain General Inv.	0.86	0.85	1.2%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Invest Bank PSC	0.45	0.44	2.3%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Abu Dhabi National Energy	1.25	1.22	2.5%	1.70
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
ELSWEDY ELECTRIC	8.30	3.6%	-15.4%	13.24	Alexandria Mineral Oils Company	3.90	-3.9%	25.0%	11.30
Orascom Development Egypt	4.84	2.5%	-1.2%	3.53	Pioneers Properties For Urban Devpt (PREDCO)	3.16	-3.4%	-3.4%	8.43
Ibnsina Pharma	3.30	2.2%	-35.2%	10.63	Raya Holding For Financial Investments	2.60	-1.9%	256.2%	1.00
Eastern Company	12.30	1.7%	-5.7%	7.79	Sidi Kerir Petrochemicals	9.16	-1.8%	-1.6%	6.37
Credit Agricole Egypt	26.50	1.6%	-8.7%	5.52	Gadwa For Industrial Devpt	1.64	-1.2%	-1.2%	3.84
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	13.45	13.45	0.0%	3.54	Commercial International Bank	44.80	44.80	0.0%	76.18
Sidi Kerir Petrochemicals	9.16	9.16	0.0%	6.37	GB AUTO	4.09	4.09	0.0%	0.84
Oriental Weavers	8.60	8.60	0.0%	1.75	Ibnsina Pharma	3.30	3.30	0.0%	10.63
MM Group For Industry And International Trade	6.60	6.60	0.0%	13.03	Medinet Nasr Housing	2.63	2.63	0.0%	7.15
Misr Fertilizers Production Company - Mopco	94.85	94.85	0.0%	16.37	Palm Hills Development	1.92	1.92	0.0%	3.62

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Titan Company	2506.00	6.1%	59.9%	8629.971	Hcl Technologies	1254.00	-3.8%	32.5%	16073.10
Bajaj Auto	3978.80	3.3%	15.5%	5358.83	HDFC Life Insurance Company	703.50	-1.9%	4.0%	2288.72
Bajaj Finserv	18238.20	3.0%	104.8%	8266.46	Coal India	193.45	-1.7%	42.8%	4905.85
State Bank Of India	483.00	2.9%	75.7%	16112.33	Tech Mahindra	1377.80	-1.6%	41.6%	4072.05
Divi's Laboratories Limited	5284.00	2.7%	37.5%	2611.54	Ultratech Cement	7263.00	-0.9%	37.3%	2953.56
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Titan Company	2506.00	2507.80	-0.1%	8629.97	Hero Motocorp	2913.20	2636.00	10.5%	2783.18
State Bank Of India	483.00	484.40	-0.3%	16112.33	Britannia Inds.	3862.00	3317.30	16.4%	975.79
Divi's Laboratories Limited	5284.00	5315.50	-0.6%	2611.54	Dr Reddys Lab	4913.15	4135.00	18.8%	1400.09
Hdfc Bank	1630.00	1645.00	-0.9%	6675.58	Maruti Suzuki India	7690.00	6400.00	20.2%	3129.72
Indusind Bank	1179.05	1196.00	-1.4%	2774.54	Nestle India Limited	19424.50	15375.00	26.3%	1388.02

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	9.30	2.0%	14.0%	0.28	Total Kenya Ltd	24.65	-2.4%	2.7%	0.38
Safaricom Plc	41.85	0.5%	22.2%	456.80	Bamburi Cement Limited	36.30	-2.0%	-4.1%	0.14
Nation Media Group	22.45	0.4%	45.3%	0.34	Kengen Limited	4.70	-1.7%	-0.2%	0.68
WPP Scangroup Plc	4.95	0.4%	-17.5%	0.01	Centum Investment Company Plc	17.20	-1.1%	7.2%	0.70
Equity Group Holdings Plc	49.50	0.3%	35.4%	99.63	Kenya Power & Lighting Limited	1.77	-1.1%	3.5%	0.55
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%	0.72	Standard Chartered Bank Kenya Ltd	129.00	127.00	1.6%	13.53
Kenya Power & Lighting Limited	1.77	1.90	-6.8%	0.55	Diamond Trust Bank Limited	60.25	57.50	4.8%	0.13
Safaricom Plc	41.85	45.25	-7.5%	456.80	East African Breweries Limited	164.75	148.00	11.3%	180.43
KCB Group Plc	45.80	50.75	-9.8%	90.24	Total Kenya Ltd	24.65	21.50	14.7%	0.38
Equity Group Holdings Plc	49.50	55.00	-10.0%	99.63	The Cooperative Bank of Kenya Ltd	13.10	11.05	18.6%	0.72

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
National Petrochemical Co.	49.15	5.9%	47.8%	27.55	International Company for Water and Power Projects	66.70	-8.4%	-8.4%	3101.18
Methanol Chemicals Co.	38.70	4.6%	200.0%	181.01	Saudi Ceramic Co.	57.20	-4.2%	59.1%	28.14
Dur Hospitality Co.	34.70	4.2%	21.1%	54.10	Jadwa REIT Saudi Fund	14.26	-3.7%	1.9%	10.77
Al-Babtain Power and Telecommunication Co.	37.25	3.5%	17.7%	16.69	Etihad Atheeb Telecommunication	29.25	-3.6%	164.5%	41.21
Saudi Arabian Fertilizer Co.	389.40	2.7%	383.1%	97.54	City Cement Co.	25.10	-3.3%	-2.0%	59.32
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	63.30	63.30	0.0%	162.20	BinDawood Holding	103.40	103.40	0.0%	9.39
Zamil Industrial Investment Co.	36.25	36.25	0.0%	20.28	Ntl Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Yanbu National Petrochemical Co.	75.90	75.90	0.0%	120.32	Savola Group	37.05	36.60	1.2%	15.87
United Electronics Co.	137.00	137.00	0.0%	35.18	International Company for Water and Power Projects	66.70	64.60	3.3%	3101.18
United Cooperative Assurance Co.	33.00	33.00	0.0%	18.69	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Impala Platinum	21245.00	3.8%	5.2%	93108.17	RMB Holdings Ltd	147.00	-6.4%	76.8%	4192.39
Investec Ltd (JSE)	6398.00	3.3%	69.9%	9618.68	Sasol Limited	27502.00	-5.6%	105.3%	62721.61
Investec Plc	6446.00	2.2%	75.9%	4789.42	Naspers Ltd	251100.00	-2.2%	-16.8%	104026.96
Multichoice Group	11879.00	2.2%	-11.4%	15548.26	Prosus	121800.00	-1.7%	-24.2%	88062.86
Nedbank Group	17245.00	2.1%	33.2%	27111.42	Reinet Investments	27863.00	-1.5%	1.1%	5328.91
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)
Redefine Properties	468.00	475.00	-1.5%	7793.09	Brit.Amer.Tobacco	51682.00	50757.00	1.8%	58201.32
MTN Group	14350.00	14630.00	-1.9%	38307.30	Prosus	121800.00	114101.00	6.7%	88062.86
Bid Corporation	33079.00	33799.00	-2.1%	22788.82	Naspers Ltd	251100.00	229087.00	9.6%	104026.96
Investec Plc	6446.00	6660.00	-3.2%	4789.42	Spar Group	19061.00	17111.00	11.4%	9319.97
Old Mutual Limited	1645.00	1701.00	-3.3%	36738.54	Reinet Investments	27863.00	24721.00	12.7%	5328.91

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
PetroVietnam Power Corp	12700.00	2.4%	-6.6%	278.015,30	Phu Nhuan Jewelry	100000.00	-2.0%	24.6%	40.276.60
Mobile World Inv. Corp	132100.00	2.0%	11.1%	300.593.92	Saigon Securities	41400.00	-1.2%	97.6%	314.608.72
Vincom Retail	30800.00	1.2%	-71.4%	236.862.27	Masan Group Corp	145500.00	-1.0%	65.1%	99070.59
Vingroup JSC	92900.00	1.1%	-5.1%	225.801.37	No Va Land Invest	103000.00	-1.0%	114.1%	242.501.68
Bank for Inv. and Devp	40250.00	0.6%	-16.0%	80.180.59	Tien Phong Commercial Joint Stock Bank	42700.00	-0.9%	35.6%	80263.80
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	132500.00	132500.00	0.0%	122.196.42	Military Commercial Bank	28750.00	28750.00	0.0%	428997.20
Vingroup JSC	92900.00	92900.00	0.0%	225.801.37	Vietnam National Petroleum Group	55000.00	55000.00	0.0%	163.117.49
Techcombank	53000.00	53000.00	0.0%	753.561.98	PetroVietnam Power	12700.00	12700.00	0.0%	278.015,30
Phu Nhuan Jewelry	100000.00	100000.00	0.0%	40.276.60	Sai Gon Thuong Tin Commercial	26600.00	26600.00	0.0%	310381.10
No Va Land Invest	103000.00	103000.00	0.0%	242.501.68	Tien Phong Commercial Joint Stock Bank	42700.00	42700.00	0.0%	80263.80

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