

Daily Market Report

14 October 2021

JSE

JSE All-Share Index inched up by 0.04% to close at 66,012.75 points on Wednesday, as the Industrial sector recorded gains.

BRVM

BRVM Composite Index closed at 188.20 points, up by 0.31% on Wednesday with Air Liquide Côte d'Ivoire and Sicor Côte d'Ivoire being the top gainers.

NSE

NSE All-Share increased by 0.38% to close at 41,051.19 points on Wednesday, as the Insurance, Oil & Gas, Banking, Consumer goods and Industrial sectors recorded gains.

EGX

EGX 30 Index rose by 0.90% and closed at 10,881.40 points on Wednesday, as the market gained LE 1.2 billion of market cap, amid Egyptian buying.

ESG

Casablanca ESG 10 Index closed at 990.97 points on Wednesday, as it increased by 0.41%.

African Markets

Nigeria: NSE 30 Index increased by 0.46% and closed at 1,701.40 points on Wednesday. Okomu Oil and Sterling were the top gainers.

Egypt: EGX 30 Index rose by 0.90% and closed at 10,881.40 points on Wednesday, as the market gained LE 1.2 billion of market cap, amid Egyptian buying.

Kenya: NSE 20 Index decreased by 0.37% and closed at 1,974.15 points on Wednesday. Nairobi Securities Exchange and Kenya Reinsurance Corporation were the top losers.

South Africa: JSE Top 40 Index inched up by 0.03% to close at 59,516.75 points on Wednesday, as the Industrial sector recorded gains.

Capital Markets

JSE

Johannesburg Stock Exchange ▲ 0.04%

BRVM

Bourse Régionale des Valeurs Mobilières ▲ 0.31%

NSE

Nigerian Stock Exchange ▲ 0.38%

EGX

Egyptian Stock Exchange ▲ 0.90%

ESG

Casablanca Stock Exchange ▲ 0.41%

Nigeria Key Indicators

	Current
Inflation	17.01%
Exchange Rate	₦ 410.87
INTERBANK RATES	
OBB	7.50 ▲
Overnight	8.00 ▲

Other Emerging Markets

Abu Dhabi: ADX General inched down by 0.01% to close at 7,786.29 points on Wednesday, as Etisalat and First Abu Dhabi Bank recorded gains. MSCI UAE Index increased by 0.35% to close at 410.60 points.

Vietnam: VN-30 Index decreased by 0.27% to close at 1,505.55 points on Wednesday, as the blue-chip companies recorded losses. MSCI Vietnam declined by 0.50% to close at 1,060.72 points.

Saudi Arabia: Tadawul All Share Index increased by 0.71% to close at 11,624.98 points on Wednesday, as gains in the Building & Construction, Retail and Cement sectors led shares higher. MSCI Saudi Arabia rose 0.80% to close at 1,608.93 points.

India: Nifty 50 market rose by 0.94% to close at 18,161.75 points on Wednesday, as gains in the Auto, Power and Green Energy sectors led shares higher. MSCI India jumped by 1.01% to close at 2,111.68 points.

News

Nigeria:

IMF increases Nigeria's 2021 growth prospect to 2.6%
Nigeria's oil output 360,000bpd lower than OPEC quota
National development plan implementation to gulp N350tn – Govt

Kenya:

Bill exempts fuel from excise review, halves VAT to tame prices
Kenya Cautious on Multinational firms' Digital Tax Reforms
Jinnah Mbaru firm to earn hefty fees in Uganda telco IPO

Abu Dhabi:

UAE central bank, Abu Dhabi Global Market sign MoU to support fintech
Etihad Airways raises \$1.2bn in aviation's first sustainability-linked ESG loan
Accenture, Etisalat Digital, Oracle collaborate to drive digital transformation

Saudi Arabia:

Opec maintains 2022 outlook & expects oil demand to surge pre-Covid levels
Saudi retailer Alhokair to divest majority stake in Billy Beez
Saudi Industrial Devp. Fund expands its activity, launches 3 new products

Egypt:

Egypt to join JP Morgan bond index for emerging markets by end of Jan 2022
Egypt, Greece to sign electricity interconnection agreement
EFG Hermes' consumer finance platform valU aims to reach 250,000 users by 2022

South Africa:

Eni to exit SA offshore oil block amid tech challenges
SA mining buoyed by rising output in gold, iron ore
IMF revises SA growth forecast, lowers global predictions

India:

Customs duty on crude edible oils cut
Tata Motors to invest \$2 billion in EVs after fundraise from TPG
Vi eyes equity finance instead of debt, aims at \$1 bn

Vietnam:

WB lowers Vietnam's GDP growth forecast to 2-2.5 percent this year
Securities companies rush to promote margin lending
HDBank achieves 82% of full-year plan in 9 months

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,786.29	-0.01%	1.0%	1.1%	54.3%	AED/USD	3.67	0.0%	0.0%
Egypt	10,881.40	0.9%	3.3%	3.5%	0.3%	EGP/USD	15.71	0.0%	-0.1%
India	18,161.75	0.9%	1.5%	3.1%	29.9%	INR/USD	75.38	-0.2%	3.2%
Kenya	1,974.15	-0.4%	-0.9%	-2.8%	5.7%	KES/USD	110.85	0.0%	1.5%
Nigeria	1,701.40	0.5%	0.5%	1.6%	3.7%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,624.98	0.7%	0.3%	1.1%	33.8%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,516.75	0.03%	1.2%	2.9%	9.4%	ZAR/USD	14.83	-1.0%	0.9%
Vietnam	1,505.55	-0.3%	2.0%	3.6%	40.6%	VND/USD	22,759.00	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	674.52	0.3%	0.8%	1.8%	18.0%	Brent Crude (\$)	83.18	-0.3%	60.6%
MSCI Frontier 100	1,538.56	0.3%	0.8%	1.9%	22.3%	Gold (\$)	1,794.70	2.0%	-5.3%
MSCI Emerging	1,260.23	0.5%	0.3%	0.6%	-2.4%	Copper (\$)	9,651.00	2.0%	24.3%
MSCI World (USD)	3,039.01	0.5%	-0.2%	1.1%	13.0%	Coffee (\$)	185.38	2.4%	55.5%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Transcorp Hotels	5.97	9.9%	65.8%	1.76	Wema	0.73	-3.9%	5.8%	3.44
Okomu Oil	125.00	8.2%	37.4%	15.98	Ecobank	7.35	-0.7%	22.5%	316.09
Sterling	1.53	4.8%	-25.0%	3.31					
Cadbury	8.50	4.3%	-5.6%	6.28					
UBA	8.30	3.1%	-4.0%	137.64					
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%	17.93	UBN	5.00	4.65	7.5%	18.44
Transcorp Hotels	5.97	5.97	0.0%	1.76	Unilever	13.20	10.50	25.7%	15.73
Total	192.00	192.00	0.0%	10.57	Cap	19.60	15.25	28.5%	0.69
Seplat Petroleum	710.00	710.00	0.0%	231.63	Cadbury	8.50	6.30	34.9%	6.28
Presco	85.00	85.00	0.0%	10.50	Sterling	1.53	1.13	35.4%	3.31

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Zee Store	39.10	15.0%	272.4%	29.59	Al Qudra Holding	5.70	-4.2%	418.2%	17.98
Response Plus Holding	14.86	10.9%	18.9%	26.29	Abu Dhabi Aviation	4.30	-2.7%	18.8%	0.55
Methaq Takaful Ins.	0.86	10.1%	-0.9%	6.42	Emirates Insurance Co.	6.52	-2.7%	-8.2%	0.00
Palms Sports	15.58	9.7%	18.0%	27.64	National Marine Dredging	13.22	-2.1%	120.0%	21.41
National Takaful Company	0.95	8.5%	-5.0%	0.00	Abu Dhabi National Energy	1.23	-1.6%	-14.6%	2.79
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	Abu Dhabi National Energy	1.23	1.23	0.0%	2.78
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Umm Al Qaiwain General Inv.	0.86	0.85	1.2%	0.03
Invest Bank PSC	0.45	0.45	0.0%	0.00	Invest Bank PSC	0.45	0.44	2.3%	0.00
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£)
Fawry For Banking Tech And Electronic Payment	16.40	6.4%	-37.2%	89.07	Aspire Capital Holding	0.38	-9.5%	-9.5%	7.14
Alexandria Mineral Oils Company	4.10	5.1%	31.4%	19.40	Pioneers Properties For Urban Devpt(PREDCO)	2.96	-6.3%	-9.5%	8.66
Misr Fertilizers ProductionCompany - Mopco	97.49	2.8%	65.8%	17.19	Gadwa For Industrial Development	1.54	-6.3%	-7.4%	7.58
Abou Kir Fertilizers	20.32	2.6%	-1.7%	17.24	Orascom Development	4.68	-3.3%	-4.5%	6.18
Egyptian Financial Group-HermesHolding Company	12.21	1.8%	-16.5%	12.54	GB AUTO	4.00	-2.2%	20.5%	13.20
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	13.49	13.49	0.0%	4.66	Cleopatra Hospital Company	4.14	4.14	0.0%	1.53
Sidi Kerir Petrochemicals	9.20	9.20	0.0%	9.80	Commercial International Bank	45.30	45.30	0.0%	121.42
Oriental Weavers	8.59	8.59	0.0%	4.64	GB AUTO	4.00	4.00	0.0%	13.20
MM Group For Industry AndInternational Trade	6.54	6.54	0.0%	31.78	Ibnsina Pharma	3.23	3.23	0.0%	5.63
Misr Fertilizers ProductionCompany - Mopco	97.49	97.49	0.0%	17.19	Medinet Nasr Housing	2.63	2.63	0.0%	4.44

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tata Motors	509.70	21.1%	177.2%	98531.287	Maruti Suzuki India	7495.00	-2.6%	-2.0%	8227.00
Mahindra & Mahindra	936.20	5.2%	29.9%	16445.31	ONGC	160.00	-2.2%	72.0%	2684.49
Tata Consumer products ltd.	851.75	4.4%	44.4%	6096.06	SBI Life Insurance	1189.25	-1.8%	31.5%	1538.35
ITC	250.90	4.0%	20.0%	12311.18	Coal India	190.30	-1.6%	40.5%	3327.92
Power Grid Corp Of India	200.05	3.5%	5.4%	4960.10	HUL	2647.90	-1.1%	10.5%	4404.23
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
ITC	250.90	250.90	0.0%	12311.18	Hero Motocorp	2920.10	2636.00	10.8%	2212.55
Hdfc Bank	1637.00	1648.00	-0.7%	5099.21	Maruti Suzuki India	7495.00	6400.00	17.1%	8227.00
Sun Pharm.Industries	840.60	846.80	-0.7%	3458.24	Britannia Inds.	3890.00	3317.30	17.3%	675.62
Reliance Industries	2698.00	2720.00	-0.8%	12370.60	Dr Reddys Lab	4924.75	4135.00	19.1%	1189.18
Hindalco Industries	507.40	512.00	-0.9%	4501.61	Nestle India Limited	19320.00	15375.00	25.7%	1042.21

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
WPP Scangroup Plc	5.04	1.8%	-16.0%	0.11	Nairobi Securities Exchange Plc	9.04	-2.8%	10.8%	0.27
Centum Investment Company Plc	17.45	1.5%	8.7%	1.39	Kenya Reinsurance Corporation Ltd	2.45	-2.0%	5.6%	7.54
Total Kenya Ltd	25.00	1.4%	4.2%	0.02	Kengen Limited	4.65	-1.1%	-1.3%	2.48
NCBA Group Plc	25.35	1.2%	-5.2%	0.56	Nation Media Group	22.25	-0.9%	44.0%	0.37
Safaricom Plc	42.00	0.4%	22.6%	20.27	KCB Group Plc	45.40	-0.9%	19.2%	6.14
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)
Kenya Power & Lighting Limited	1.77	1.86	-4.8%	1.53	Standard Chartered Bank Kenya Ltd	128.75	127.00	1.4%	0.58
The Cooperative Bank of Kenya Ltd	13.10	14.05	-6.8%	0.69	Diamond Trust Bank Limited	60.25	57.50	4.8%	1.06
Safaricom Plc	42.00	45.25	-7.2%	20.27	East African Breweries Limited	163.50	148.00	10.5%	3.17
Centum Investment Company Plc	17.45	19.00	-8.2%	1.39	Total Kenya Ltd	25.00	21.50	16.3%	0.02
Total Kenya Ltd	25.00	27.50	-9.1%	0.02	The Cooperative Bank of Kenya Ltd	13.10	11.05	18.6%	0.69

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Al Abdullatif Industrial Investment Co.	35.05	9.9%	129.1%	107.85	Dr. Sulaiman Al Habib Medical Services Group	163.40	-1.5%	49.9%	31.07
Saudi Arabia Refineries Co.	149.80	7.8%	42.4%	130.15	Banque Saudi Fransi	41.30	-1.2%	30.7%	19.03
Baazeem Trading Co.	117.60	6.9%	30.4%	44.11	Bank Albilad	41.95	-1.1%	48.0%	14.06
Saudi Vitrified Clay Pipes Co.	91.90	6.4%	-7.2%	35.19	Intl Co for Water and Power Projects	66.00	-1.1%	-9.3%	723.95
Al Hassan Ghazi Ibrahim Shaker Co.	25.50	5.5%	58.2%	192.34	Bupa Arabia for Cooperative Insurance Co.	140.80	-0.9%	15.2%	8.33
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	62.90	62.90	0.0%	14.07	BinDawood Holding	103.60	103.60	0.0%	9.30
The Saudi National Bank	64.00	64.00	0.0%	55.15	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	37.70	37.70	0.0%	29.92	Savola Group	37.25	36.60	1.8%	15.35
Yanbu National Petrochemical Co.	79.30	79.30	0.0%	159.75	Intl Co for Water and Power Projects	66.00	64.60	2.2%	723.95
United International Transportation Co.	49.40	49.40	0.0%	16.72	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)
Anglo American Platinum	159321.00	3.3%	17.2%	33708.50	MTN Group	14086.00	-1.8%	134.0%	31970.23
Anglogold Ashanti	28004.00	3.2%	-18.2%	21761.29	Firstrand Ltd	6049.00	-1.6%	18.5%	80879.96
Gold Fields	14013.00	2.8%	1.9%	23932.21	BHP Group	39260.00	-1.4%	0.9%	39918.04
Reinet Investments	28620.00	2.7%	3.8%	6263.37	RMB Holdings Ltd	145.00	-1.4%	74.4%	743.37
Sibanye Stillwater	5584.00	1.8%	-6.9%	49514.73	Sanlam Limited	6101.00	-1.3%	3.8%	23902.81
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	6481.00	6660.00	-2.7%	3232.17	Brit.Amer.Tobacco	52210.00	50757.00	2.9%	56110.35
Bid Corporation	32888.00	33799.00	-2.7%	12131.73	Prosus	122226.00	114101.00	7.1%	67983.45
Redefine Properties	463.00	479.00	-3.3%	4359.46	Naspers Ltd	254591.00	229087.00	11.1%	55278.07
Investec Ltd	6422.00	6646.00	-3.4%	5644.63	Spar Group	19041.00	17111.00	11.3%	7600.98
MTN Group	14086.00	14630.00	-3.7%	31970.23	Vodacom Group	13800.00	12024.00	14.8%	13019.75

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Phat Dat Real Estate Development Corp	90600.00	2.4%	116.2%	488.120.56	BaoViet Holdings	60000.00	-3.1%	-9.1%	95.148.39
Mobile World Inv. Corp	133900.00	1.4%	12.6%	253.046.29	Vietnam National Petroleum Group	53800.00	-2.2%	0.6%	96276.39
Vietjet Aviation	133900.00	1.1%	49.6%	108802.92	Masan Group Corp	143100.00	-1.7%	62.4%	165.109.00
Phu Nhuan Jewelry	101000.00	1.0%	25.9%	47528.31	PetroVietnam Power	12500.00	-1.6%	-8.1%	191940.91
Ho Chi Minh City Devp	25700.00	0.6%	8.2%	73917.89	Sai Gon Thuong Tin Commercial	26250.00	-1.3%	-19.2%	254.336.51
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	133900.00	133900.00	0.0%	108802.92	Military Commercial Bank	28600.00	28600.00	0.0%	281796.40
Vingroup JSC	93100.00	93100.00	0.0%	241.175.20	Vietnam National Petroleum Group	53800.00	53800.00	0.0%	96276.39
Techcombank	52400.00	52400.00	0.0%	748479.17	PetroVietnam Power	12500.00	12500.00	0.0%	191940.91
Phu Nhuan Jewelry	101000.00	101000.00	0.0%	47528.31	Sai Gon Thuong Tin Commercial	26250.00	26250.00	0.0%	254.336.51
Phat Dat Real Estate Development Corp	90600.00	90600.00	0.0%	488.120.56	Tien Phong Commercial Joint Stock Bank	42400.00	42400.00	0.0%	98236.74

Email: research@fsdhgroup.com • www.fsdhgroup.com

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