

Daily Market Report

20 October 2021

JSE

JSE All-Share Index inched down by 0.02% to close at 66,776.13 points on Tuesday, as the Financial and Resource sector recorded losses.

BRVM

BRVM Composite Index closed at 187.97 points, down by 0.43% on Tuesday with Palm Côte d'Ivoire and CFAO Motors Côte d'Ivoire being the top losers.

NSE

NSE All-Share Index was closed on Tuesday on account of Mawlid.

EGX

EGX 30 Index declined by 0.72% and closed at 11,195.05 points on Tuesday, amid Egyptian selling.

ESG

Casablanca ESG 10 Index closed at 995.11 points on Tuesday, as it decreased marginally by 0.07%.

Capital Markets

JSE Johannesburg Stock Exchange	▼ 0.02%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.43%
NSE Nigerian Stock Exchange	↔ 0.00%
EGX Egyptian Stock Exchange	▼ 0.72%
ESG Casablanca Stock Exchange	▼ 0.07%

African Markets

Nigeria: NSE 30 Index was closed on Tuesday on account of Mawlid.

Egypt: EGX 30 Index declined by 0.72% and closed at 11,195.05 points on Tuesday, amid Egyptian selling.

Kenya: NSE 20 Index was down by 0.16% and closed at 1,959.67 points on Tuesday. WPP Scangroup and NCBA Group were the top losers.

South Africa: JSE Top 40 Index slipped by 0.05% to close at 60,190.06 points on Tuesday, as the Financial and Resource sector recorded losses.

Nigeria Key Indicators

	Current
Inflation	16.63%
Exchange Rate	₦ 410.89
INTERBANK RATES	
OBB	15.00 ↔
Overnight	15.50 ↔

Other Emerging Markets

Abu Dhabi: ADX General decreased 0.06% to close at 7,888.41 points on Tuesday, as Etisalat and First Abu Dhabi Bank recorded losses. MSCI UAE Index was down by 0.13% to close at 416.71 points.

Vietnam: VN-30 Index decreased by 0.22% to close at 1,507.19 points on Tuesday, as the blue-chip companies recorded losses. MSCI Vietnam decreased by 0.19% to close at 1,057.27 points.

Saudi Arabia: Tadawul All Share Index increased by 0.29% to close at 11,792.54 points on Tuesday, as gains in the Financial Services, Telecoms & IT and Transport sectors led shares higher. MSCI Saudi Arabia increased by 0.28% to close 1,622.98 points.

India: Nifty 50 market decreased 0.32% to close at 18,418.75 points on Tuesday, as losses in the Real Estate, Fast Moving Consumer Goods and Consumer Durables sectors pushed shares lower. MSCI India declined by 0.56% to close at 2,129.54 points.

News

Nigeria:

NGX suspends four firms for market infractions, to delist three
FG budgets N104bn to maintain, purchase generators in 2022
Fidelity Bank to Raise \$500m Unsecured Notes From International Market

Kenya:

County revenues decrease Sh1.3bn on shaky economy
Pension funds participation in market drops
State gets Sh36bn dividend windfall despite Covid-19 hit

Abu Dhabi:

Sharjah Islamic Bank to raise foreign ownership limit to 40%
UAE's Gulf Islamic Investment to open office in India, invest \$500mln
Dubai Du's Q3 net profit plunges to \$77mln on higher expenses

Saudi Arabia:

Saudi holdings of US treasury bills fell to lowest in 14 months
ACWA Power among bidders of 1,200 MW Saudi renewable energy projects
Saudi telco Mobily posts 26% rise in net profit

Egypt:

Egypt approves establishing Digital Egypt Fund, rationalizing investment
Egypt, Greece, Cyprus sign electricity linkage MoUs
Egypt targets growth rate of 5.4%, deficit reduction to 6.7% in 21/22

South Africa:

SARB gives Steinhoff green light to send cash abroad for global settlement
Sept trade conditions for businesses should ease after civil unrest in July
Irongate receives 'unsolicited' R12 billion bid from 360 Capital Group

India:

HUL's Q2 profit rises 9% amid high inflation
India's exports up 40.5% to \$15.13 billion during Oct 1-14
Govt to roll out 5-year strategic plan to make India big tech player

Vietnam:

Viet Nam ratifies ASEAN Trade in Services Agreement
Đà Nẵng to reboot tourism from October 20
Strong stock market gives securities firms profit a boost in Q3

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,888.41	-0.1%	1.0%	2.5%	56.4%	AED/USD	3.67	0.0%	0.0%
Egypt	11,195.05	-0.7%	1.8%	6.4%	3.2%	EGP/USD	15.72	0.1%	-0.1%
India	18,418.75	-0.3%	0.4%	4.5%	31.7%	INR/USD	75.35	0.0%	3.1%
Kenya	1,959.67	-0.2%	-0.5%	-3.5%	4.9%	KES/USD	111.05	0.1%	1.7%
Nigeria	1,707.29	0.0%	-0.8%	2.0%	4.1%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,792.54	0.3%	0.8%	2.6%	35.7%	SAR/USD	3.75	0.0%	0.0%
South Africa	60,190.06	-0.1%	-0.5%	4.0%	10.7%	ZAR/USD	14.54	-1.0%	-1.0%
Vietnam	1,507.19	-0.2%	0.2%	3.7%	40.8%	VND/USD	22,757.50	0.0%	-1.4%

MSCI Emerging Markets

MSCI Frontier	679.70	-0.02%	0.2%	2.6%	18.9%	Brent Crude (\$)	85.08	0.9%	64.2%
MSCI Frontier 100	1,548.02	-0.1%	-0.01%	2.6%	23.1%	Gold (\$)	1,770.50	0.3%	-6.6%
MSCI Emerging	1,294.57	0.9%	0.8%	3.3%	0.3%	Copper (\$)	10,149.50	-0.5%	30.7%
MSCI World (USD)	3,136.19	0.7%	0.9%	4.3%	16.6%	Coffee (\$)	180.80	0.01%	51.7%

STOCKS

Nigeria*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	7.85	7.5%	34.2%	7.96	FBNH	11.75	-7.5%	64.3%	832.80
FCMB	3.15	2.9%	-5.4%	17.12	Nestle	1405.00	-5.1%	-6.6%	325.59
Lafarge Africa	24.75	2.7%	17.6%	131.10	Wema	0.75	-5.1%	8.7%	1.69
Transnational Corporation	1.01	2.0%	12.2%	26.62	MTNN	169.90	-2.9%	0.0%	256.38
Sterling	1.55	2.0%	-24.0%	0.71	United Capital PLC	9.65	-2.0%	131.4%	168.03
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	11.00	11.00	0.0%	25.94	UBN	5.30	4.65	14.0%	14.55
Transcorp Hotels	5.97	5.97	0.0%	0.01	Unilever	13.20	10.50	25.7%	3.00
Total	193.00	193.00	0.0%	80.60	Cap	19.60	15.25	28.5%	0.98
Seplat Petroleum	720.00	720.00	0.0%	10.36	Cadbury	8.50	6.30	34.9%	1.39
Presco	89.00	89.00	0.0%	46.45	Sterling	1.55	1.13	37.2%	0.71

*Market closed on 19/10

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
RAK Co. for White Cement & Construction	1.46	15.0%	72.0%	3.61	Abu Dhabi National Takaful	4.88	-10.0%	25.1%	0.00
Gulf Pharmaceutical Ind.	1.99	6.4%	49.6%	38.83	Ooredoo	6.10	-9.0%	-18.9%	0.06
Sharjah Group Co.	3.07	5.9%	261.2%	0.13	Sudatel Telecom	0.35	-6.7%	-15.7%	0.02
Anan Investment Holding	3.25	5.5%	10.5%	3.25	Zee Store	38.02	-6.0%	262.1%	22.74
Ras Al Khaimah Cement Investment Co	4.90	4.5%	44.5%	60.27	Abu Dhabi Aviation	4.32	-4.6%	19.3%	1.13
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%	2.12
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£)
Egyptian Kuwaiti Holding-EGP	20.89	3.5%	17.7%	22.65	Aspire Capital Holding	0.34	-9.4%	-19.9%	4.37
Alexandria Mineral Oils Company	4.05	1.3%	29.8%	22.83	Raya Holding For Financial Investments	2.41	-7.7%	230.1%	1.76
ELSWEDY ELECTRIC	8.61	1.1%	-12.2%	32.51	Speed Medical	1.72	-6.0%	5.2%	13.67
Orascom Development Egypt	4.94	0.8%	0.8%	15.67	Pioneers Properties For UrbanDevp (PREDCO)	2.91	-5.2%	-11.0%	5.77
Telecom Egypt	13.70	0.7%	14.8%	3.54	Gadwa For Industrial Devp	1.41	-4.4%	-15.3%	1.48
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	13.70	13.70	0.0%	3.54	Aspire Capital Holding	0.34	0.34	0.0%	4.37
Sidi Kerir Petrochemicals	9.60	9.60	0.0%	23.57	Commercial International Bank	47.50	47.50	0.0%	87.73
Oriental Weavers	8.37	8.37	0.0%	2.34	Gadwa For Industrial Devp	1.41	1.41	0.0%	1.48
MM Group For Industry AndInternational Trade	6.71	6.71	0.0%	19.80	GB AUTO	4.35	4.35	0.0%	19.09
Misr Fertilizers Production - Mopco	94.54	94.54	0.0%	10.01	Ibnsina Pharma	3.33	3.33	0.0%	9.56

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Tech Mahindra	1542.70	4.3%	58.5%	13265.141	ITC	246.10	-6.3%	17.8%	14846.95
Larsen & Toubro	1848.00	3.3%	43.5%	12272.92	Tata Motors	484.75	-4.9%	163.7%	28603.48
Infosys	1823.50	1.8%	45.2%	18778.07	Eicher Motors	2699.00	-4.5%	6.6%	2746.07
Kotak Mahindra Bank	2044.00	1.6%	2.4%	3422.26	HUL	2557.30	-3.6%	6.8%	14305.77
Bajaj Finserv	18935.80	1.4%	112.6%	7385.79	Titan Company	2496.00	-3.6%	59.3%	8963.27
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Infosys	1823.50	1834.50	-0.6%	18778.07	Tata Steel	1369.00	389.60	251.4%	12218.36
Reliance Industries	2730.80	2751.35	-0.7%	11144.08	Bajaj Finserv	18935.80	5511.05	243.6%	7385.79
Icici Bank	746.65	755.00	-1.1%	8496.46	Hindalco Industries	535.90	165.30	224.2%	5942.74
Kotak Mahindra Bank	2044.00	2077.80	-1.6%	3422.26	State Bank Of India	488.70	185.90	162.9%	10249.47
NTPC	149.50	152.10	-1.7%	3049.74	Bajaj Finance	7720.30	3101.35	148.9%	9759.43

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	8.94	4.7%	9.6%	0.07	WPP Scangroup Plc	4.75	-3.1%	-20.8%	0.18
Stanbic Holdings	90.00	4.7%	5.9%	0.04	NCBA Group Plc	25.10	-1.8%	-6.2%	0.87
Total Kenya Ltd	24.65	1.4%	2.7%	2.67	Safaricom Plc	42.15	-1.7%	23.1%	273.03
Absa Bank Kenya	10.20	1.0%	5.6%	3.31	Kengen Limited	4.72	-1.5%	0.2%	0.86
Kenya Reinsurance Corporation Ltd	2.46	0.4%	6.0%	0.17	Diamond Trust Bank Limited	57.75	-0.9%	-23.0%	1.18
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)
Safaricom Plc	42.15	45.25	-6.9%	273.03	Standard Chartered Bank Kenya Ltd	129.25	127.00	1.8%	1.33
Centum Investment Company Plc	17.50	19.00	-7.9%	35.85	Diamond Trust Bank Limited	57.75	55.25	4.5%	1.18
Stanbic Holdings	90.00	99.00	-9.1%	0.04	East African Breweries Limited	165.00	148.00	11.5%	88.03
The Cooperative Bank of Kenya Ltd	12.75	14.05	-9.3%	1.84	Total Kenya Ltd	24.65	21.50	14.7%	2.67
Kenya Power & Lighting Limited	1.68	1.86	-9.7%	1.72	The Cooperative Bank of Kenya Ltd	12.75	11.05	15.4%	1.84

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Tourism Enterprise Co.	74.60	4.3%	35.6%	134.01	Yanbu National Petrochemical Co.	77.20	-3.5%	20.8%	122.47
Al Rajhi Bank	139.00	3.1%	88.9%	504.48	Arabia Insurance Cooperative Co.	40.30	-3.1%	113.5%	61.06
Middle East Paper Co.	46.50	2.9%	140.7%	56.57	Alinma Tokio Marine Co.	31.20	-3.1%	28.0%	21.36
Etihad Etisalat Co.	31.10	2.8%	8.6%	146.00	Rabigh Refining and Petrochemical Co.	30.00	-3.1%	117.1%	274.43
Saudi Re for Cooperative Reinsurance Co.	19.36	2.8%	28.0%	62.97	Amana Cooperative Insurance Co.	50.70	-2.9%	36.5%	39.49
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	64.60	64.60	0.0%	29.67	BinDawood Holding Co.	106.80	105.60	1.1%	4.86
The Saudi National Bank	64.90	64.90	0.0%	269.22	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Zamil Industrial Investment Co.	37.60	37.60	0.0%	23.11	Savola Group	37.95	36.60	3.7%	26.22
Yanbu National Petrochemical Co.	77.20	77.20	0.0%	122.47	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United International Transportation Co.	51.10	51.10	0.0%	27.11	Tanmiah Food Co.	93.30	87.10	7.1%	29.04

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Naspers Ltd	263500.00	3.3%	-12.7%	86827.99	Sasol Limited	26800.00	-3.9%	100.1%	28019.43
Prosus (JSE)	128991.00	2.7%	-19.7%	132166.63	MTN Group	13672.00	-2.3%	127.1%	56631.09
Bid Corporation	33199.00	1.7%	26.2%	18132.50	ABSA Group	14321.00	-1.4%	19.5%	13076.19
Capitec Bank	172000.00	1.1%	20.1%	35052.40	Reinet Investments (JSE) SCA	28172.00	-1.3%	2.2%	3265.36
Aspen PhmcR.Hdg.	24490.00	0.8%	95.3%	12379.79	Investec Ltd (JSE)	6716.00	-1.2%	78.4%	6056.74
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 Ltd (JSE)	6716.00	6884.00	-2.4%	6056.74	Brit.Amer.Tobacco (JSE)	51997.00	50757.00	2.4%	30208.70
Investec Plc	6799.00	6971.00	-2.5%	6392.68	Spar Group	19336.00	17111.00	13.0%	7124.48
Bid Corporation	33199.00	34399.00	-3.5%	18132.50	Prosus (JSE)	128991.00	114101.00	13.0%	132166.63
Shoprite Limited	18394.00	19150.00	-3.9%	16115.35	Reinet Investments (JSE) SCA	28172.00	24721.00	14.0%	3265.36
Remgro Limited	13560.00	14187.00	-4.4%	15961.68	Vodacom Group	13734.00	12024.00	14.2%	11993.94

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Vietjet Aviation	135200.00	3.1%	51.1%	141845.11	Sai Gon Thuong Tin Commercial	26200.00	-2.6%	-19.3%	221.416.73
BaoViet Holdings	61400.00	3.0%	-7.0%	123.490.43	Petrovietnam Gas	114500.00	-1.7%	36.4%	123.671.34
Bank for Inv. and Devp	40050.00	1.9%	-16.4%	88629.11	Vincom Retail	30300.00	-1.6%	-71.9%	112.361.40
Asia Commercial JS Bank	32300.00	0.9%	43.7%	116035.01	Masan Group Corp	141000.00	-1.4%	60.0%	108566.50
No Va Land Invest	102600.00	0.9%	113.3%	355947.66	Hoa Phat Group JSC	57200.00	-1.2%	87.3%	1364363.79
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	135200.00	135200.00	0.0%	141845.11	Military Commercial Bank	28200.00	28200.00	0.0%	217555.60
Vingroup JSC	92400.00	92400.00	0.0%	155.415.97	Vietnam National Petroleum Group	54800.00	54800.00	0.0%	65522.99
Techcombank	52700.00	52700.00	0.0%	746444.97	PetroVietnam Power Corp	12300.00	12300.00	0.0%	128331.80
Phu Nhuan Jewelry	98000.00	98000.00	0.0%	53309.82	Sai Gon Thuong Tin Commercial	26200.00	26200.00	0.0%	221.416.73
Phat Dat Real Estate Development Corp	93500.00	93500.00	0.0%	352.337.43	Tien Phong Commercial Joint Stock Bank	43900.00	43900.00	0.0%	77.147.93

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