

# Daily Market Report

## 22 October 2021

### JSE

JSE All-Share Index dropped by 1.25% to close at 66,057.56 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

### BRVM

BRVM Composite Index closed at 189.93 points, up by 0.31% on Thursday with Palm Côte d'Ivoire and Nestle Côte d'Ivoire being the top gainers.

### NSE

NSE All-Share Index increased by 1.10% to close at 41,704.11 points on Thursday, as Industrial, Insurance, Consumer goods and Banking sectors recorded gains.

### EGX

EGX 30 Index was closed on Thursday on account of Mawlid.

### ESG

Casablanca ESG 10 Index inched 0.04% to close at 995.45 points on Thursday.

### Capital Markets

**JSE** Johannesburg Stock Exchange ▼ 1.25%

**BRVM** Bourse Régionale des Valeurs Mobilières ▲ 0.31%

**NSE** Nigerian Stock Exchange ▲ 1.10%

**EGX** Egyptian Stock Exchange ⇌ 0.00%

**ESG** Casablanca Stock Exchange ▲ 0.04%

### African Markets

**Nigeria:** NSE 30 Index jumped by 1.12% and closed at 1,731.78 points on Thursday Nigerian Breweries and BUA Cement were the top gainers.

**Egypt:** EGX 30 Index was closed on Thursday on account of Mawlid.

**Kenya:** NSE 20 Index inched up by 0.08% and closed at 1,961.32 points on Thursday. East African Breweries and British American Tobacco Kenya were the top gainers.

**South Africa:** JSE Top 40 Index dropped by 1.35% to close at 59,535.08 points on Thursday, as the Industrial, Financial and Resources sectors recorded losses.

### Nigeria Key Indicators

	Current
Inflation	16.63%
Exchange Rate	₦ 410.91

### INTERBANK RATES

OBB	15.00 ▲
Overnight	15.50 ▲

### Other Emerging Markets

**Abu Dhabi:** ADX General was closed on Thursday on account of Mawlid.

**Vietnam:** VN-30 Index fell by 1.05% to close at 1,489.26 points on Thursday, as the blue-chip companies recorded losses. MSCI Vietnam declined by 0.89% to close at 1046.11 points.

**Saudi Arabia:** Tadawul All Share Index increased by 0.30% to close at 11,939.58 points on Thursday as gains in the Media & Publishing, Petrochemicals and Financial Services sectors led shares higher. MSCI Saudi Arabia rose 0.34% to close 1,650.22 points.

**India:** Nifty 50 market decreased by 0.48% to close at 18,178.10 points on Thursday, as losses in the IT, Technology and Metals sectors pushed shares lower. MSCI India declined by 0.72% to close at 2091.96 points.

### News

#### Nigeria:

Nigeria's service imports surpass exports, records \$33.7bn deficit  
External reserves gain \$3.98bn in three weeks, hit \$40.76bn  
Bol, Ebonyi sign MoU on economic stimulus for SMEs

#### Kenya:

Kenya, Malawi ink bilateral pacts to boost trade, investments  
KCB agrees to waive Sh430m penalties on NCPB loan default  
State extends bars, restaurants operating hours

#### Abu Dhabi:

Geopost acquires 20.15% stake in Dubai's Aramex  
Emirates Islamic swings to \$218m net profit on lower impairment costs  
Dubai property sales hit near-8 year high in September

#### Saudi Arabia:

Sipchem records highest profits in its history, shares skyrocket  
Saudi contracting firm Al Arabia sets new IPO price range  
Nadec turns profitable in Q3, incurs losses in nine months

#### Egypt:

Egypt, Qatar discuss cooperation in maritime transport  
First round of meetings between Egypt, EFTA on trade liberalisation kicks off  
Ezz Steel's exports exceed \$1bln in nine months

#### South Africa:

SA steelworkers back pay deal to end protracted strike  
Land Bank manages to pay off R11.4bn after defaulting last year  
Coal and iron pile up in SA on rail constraints

#### India:

L&T to invest up to Rs 5k cr to implement & adopt green energy, achieve carbon neutrality  
Aditya Birla Grp to set up Rs 1kcr paint hub in Bengal  
Indian Hotels to raise Rs 4,000 crore

#### Vietnam:

Hoa Phat enjoys record PAT in Q3  
Del Monte-Vinamilk launches new products, targets 10% dairy market share in Philippines  
Techcombank posts pre-tax profit of over 750 mn USD in 9 months

## Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	7,876.28	0.0%	0.8%	2.3%	56.1%	AED/USD	3.67	0.0%	0.0%
Egypt	11,132.07	0.0%	1.2%	5.8%	2.6%	EGP/USD	15.70	-0.1%	-0.2%
India	18,178.10	-0.5%	-0.9%	3.2%	30.0%	INR/USD	74.87	0.0%	2.5%
Kenya	1,961.32	0.1%	-0.5%	-3.4%	5.0%	KES/USD	111.00	0.0%	1.6%
Nigeria	1,731.78	1.1%	0.6%	3.4%	5.6%	NGN/USD	413.75	0.0%	4.8%
Saudi Arabia	11,939.58	0.3%	2.1%	3.9%	37.4%	SAR/USD	3.75	0.0%	0.0%
South Africa	59,535.08	-1.3%	-1.6%	2.9%	9.5%	ZAR/USD	14.55	0.7%	-1.0%
Vietnam	1,489.26	-1.0%	-1.0%	2.4%	39.1%	VND/USD	22,751.00	0.0%	-1.4%

## MSCI Emerging Markets

MSCI Frontier	677.22	-0.3%	-0.2%	2.2%	18.5%	Brent Crude (\$)	84.61	-1.4%	63.3%
MSCI Frontier 100	1,546.46	-0.1%	-0.1%	2.5%	22.9%	Gold (\$)	1,781.90	-0.2%	-6.0%
MSCI Emerging	1,293.00	-0.6%	0.7%	3.2%	0.1%	Copper (\$)	9,831.50	-3.5%	26.6%
MSCI World (USD)	3,152.33	0.1%	1.4%	4.8%	17.2%	Coffee (\$)	183.67	0.5%	30.5%

## STOCKS

### Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Nigerian Breweries	51.45	7.4%	-8.1%	18.86	United Capital PLC	9.20	-3.2%	120.6%	54.20
BUA Cement	72.00	6.1%	-6.9%	56.99	Guaranty	29.00	-2.0%	-10.4%	94.25
Dangote Sugar	18.00	2.3%	2.3%	32.91	Fidelity	2.72	-1.1%	7.9%	34.16
Ecobank	7.30	2.1%	21.7%	143.69	FBNH	12.10	-0.8%	69.2%	628.33
Wema	0.75	1.4%	8.7%	3.98	Sterling	1.52	-0.7%	-25.5%	4.84
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%	70.99	UBN	5.05	4.65	8.6%	2.20
Transcorp Hotels	5.97	5.97	0.0%	0.00	Unilever	13.20	10.50	25.7%	3.80
Total	193.00	193.00	0.0%	6.02	Cadbury	8.00	6.30	27.0%	0.72
Seplat Petroleum	720.00	720.00	0.0%	85.02	Cap	19.60	15.25	28.5%	0.64
Presco	89.00	89.00	0.0%	37.92	Sterling	1.52	1.13	34.5%	4.84

### Abu Dhabi\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Ooredoo	7.01	14.9%	-6.8%	0.01	Esg Emirates Stallions Group	9.37	-3.4%	125.2%	6.50
RAK Co. for White Cement & Construction	1.65	13.0%	94.3%	16.26	Palms Sports	13.98	-2.8%	5.9%	13.06
Abu Dhabi Aviation	4.70	8.8%	29.8%	3.13	Ras Al Khaimah Cement Investment Co	4.83	-1.4%	42.5%	17.17
Abu Dhabi National for Building Materials	0.32	7.4%	23.6%	0.09	Alpha Dhabi Holding	27.78	-1.4%	85.2%	75.68
Finance House	1.80	6.5%	-5.3%	0.02	Dana Gas PJSC	1.04	-1.0%	45.7%	4.74
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	Invest Bank PSC	0.45	0.45	0.0%	0.00
Sawaeed Holding PJSC	7.05	7.05	0.0%	0.00	Umm Al Qaiwain General Inv.	0.86	0.85	1.2%	0.00
Invest Bank PSC	0.45	0.45	0.0%	0.00	Abu Dhabi National Energy	1.25	1.22	2.5%	2.11
Al Khazna Insurance Company PSC	1.00	0.00	0.0%	0.00	Commercial Bank Intl	0.65	0.63	3.2%	0.00

\*Market closed on 21/10

## Egypt\*

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
Misr Fertilizers ProductionCo - Mopco	100.00	5.8%	70.1%	10.94	Gadwa For Industrial Development	1.34	-5.0%	-19.5%	2.07
Speed Medical	1.80	5.0%	10.4%	23.95	MM Group For Industry & Intlal Trade	6.42	-4.3%	-18.1%	20.89
Ezz Steel	15.99	3.2%	49.0%	24.91	Tenth Of Ramadan Pharma Industries & Diagnostic-Rameda	1.80	-3.5%	-52.7%	2.95
Orascom Development Egypt	5.00	1.2%	2.0%	9.56	Heliopolis Housing	4.64	-3.3%	-23.9%	4.67
Cleopatra Hospital Company	4.29	0.9%	-9.9%	3.71	Cairo For Investment & Real Estate Devp	11.64	-3.0%	-18.3%	7.04

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	13.74	13.74	0.0%	2.82	Aspire Capital Holding	0.34	0.34	0.0%	4.57
Sidi Kerir Petrochemicals	9.59	9.59	0.0%	13.71	Commercial International Bank	47.25	47.25	0.0%	189.50
Oriental Weavers	8.40	8.40	0.0%	5.26	Gadwa For Industrial Devp	1.34	1.34	0.0%	2.07
MM Group For Industry And International Trade	6.42	6.42	0.0%	20.89	GB AUTO	4.23	4.23	0.0%	17.88
Misr Fertilizers ProductionCo - Mopco	100.00	100.00	0.0%	10.94	Ibnsina Pharma	3.23	3.23	0.0%	11.22

\*Market closed on 21/10

## India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Kotak Mahindra Bank	2155.00	6.9%	8.0%	19957.870	Asian Paints	3015.00	-4.9%	9.1%	15412.55
Tata Motors	508.95	4.5%	176.8%	26161.24	Hindalco Industries	493.40	-3.8%	105.1%	7093.63
Grasim Industries	1752.00	3.5%	88.8%	2358.16	Infosys	1757.00	-2.5%	39.9%	15523.79
HDFC	2850.00	2.0%	11.4%	10600.60	Reliance Industries	2635.00	-2.4%	32.7%	25408.34
Divi's Laboratories Limited	5202.00	1.7%	35.4%	2237.29	Tata Consultancy Svs.	3532.85	-2.1%	23.4%	17274.63

Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Icici Bank	758.20	759.85	-0.2%	9110.28	Hero Motocorp	2762.00	2636.00	4.8%	2038.65
State Bank Of India	504.45	507.50	-0.6%	10411.20	Britannia Inds.	3722.00	3317.30	12.2%	1251.40
HDFC	2850.00	2896.00	-1.6%	10600.60	Dr Reddys Lab	4661.00	4135.00	12.7%	2406.33
Axis Bank	812.20	827.00	-1.8%	5936.95	Maruti Suzuki India	7565.60	6400.00	18.2%	4263.01
NTPC	148.25	152.10	-2.5%	3065.95	HUL	2448.00	2043.00	19.8%	7998.91

## Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
East African Breweries Limited	170.00	3.0%	10.2%	680.05	WPP Scangroup Plc	4.58	-3.6%	-23.7%	0.13
British American Tobacco Kenya Ltd	437.50	1.7%	21.2%	0.96	Total Kenya Ltd	24.25	-1.6%	1.0%	0.03
Kenya Power & Lighting Limited	1.70	1.2%	-0.6%	0.59	Absa Bank Kenya	10.05	-1.5%	4.0%	1.28
Kengen Limited	4.76	0.8%	1.1%	0.85	Bamburi Cement Limited	37.00	-0.9%	-2.2%	0.15
Safaricom Plc	42.50	0.8%	24.1%	409.81	Kenya Reinsurance Corporation Ltd	2.45	-0.4%	5.6%	0.06

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	42.50	45.25	-6.1%	409.81	Standard Chartered Bank Kenya Ltd	129.50	127.00	2.0%	0.53
Centum Investment Company Plc	17.50	19.00	-7.9%	9.32	Diamond Trust Bank Limited	58.00	55.25	5.0%	0.06
Kenya Power & Lighting Limited	1.70	1.86	-8.6%	0.59	Total Kenya Ltd	24.25	21.50	12.8%	0.03
Stanbic Holdings	90.00	99.00	-9.1%	0.00	East African Breweries Limited	170.00	148.00	14.9%	680.05
The Cooperative Bank of Kenya Ltd	12.70	14.05	-9.6%	1.42	The Cooperative Bank of Kenya Ltd	12.70	11.05	14.9%	1.42

## Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Baazeem Trading Co.	124.80	5.8%	38.4%	277.36	National Gypsum	46.80	-2.7%	67.4%	76.34
Dr. Sulaiman Al Habib Medical Services Group	178.20	5.2%	63.5%	71.98	Alkhorayef Water and Power Tech Co.	119.00	-2.1%	27.1%	11.44
Alahli Takaful Co.	43.50	5.0%	24.6%	49.57	United International Transportation Co.	49.70	-2.0%	30.8%	11.96
Bank Aljazira	20.06	4.1%	46.9%	351.54	Saudi Industrial Development Co. Makkah	22.26	-1.9%	56.8%	19.24
National Industrialization Co.	24.94	3.7%	82.3%	348.98	Construction and Development Co.	77.10	-1.9%	20.5%	13.71
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	65.60	65.60	0.0%	146.30	BinDawood Holding	106.20	105.60	0.6%	3.85
Zamil Industrial Investment Co.	36.40	36.40	0.0%	23.18	National Agricultural Marketing Co.	17.20	17.00	1.2%	0.00
Yanbu National Petrochemical	78.40	78.40	0.0%	72.89	Savola Group	37.85	36.60	3.4%	20.99
United International Transportation Co.	49.70	49.70	0.0%	11.96	Abdullah A. M. Al-Khodari Sons Co.	5.39	5.18	4.1%	0.00
United Electronics Co.	143.20	143.20	0.0%	14.56	Tanmiah Food Co.	92.30	87.10	6.0%	18.15

## South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Reinet Investments	28604.00	1.5%	3.8%	8898.10	Sasol Limited	25549.00	-4.7%	90.8%	49106.20
Mr Price Group	20246.00	1.3%	18.6%	16311.33	Impala Platinum	20830.00	-4.3%	3.2%	175416.91
Brit.Amer.Tobacco	52363.00	0.9%	-4.0%	32558.32	Sibanye Stillwater	5322.00	-3.4%	-11.3%	66239.19
Redefine Properties	453.00	0.7%	36.0%	4873.97	BHP Group	38715.00	-3.2%	-0.5%	51959.01
Bidvest Group	18814.00	0.6%	19.8%	13192.26	Anglo American Platinum	154763.00	-3.1%	13.8%	48574.22
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	6596.00	6884.00	-4.2%	7480.71	Brit.Amer.Tobacco	52363.00	50757.00	3.2%	32558.32
Shoprite Limited	18339.00	19150.00	-4.2%	16678.83	Vodacom Group	13531.00	12024.00	12.5%	21309.97
Investec Plc	6669.00	6971.00	-4.3%	16724.63	Spar Group	19281.00	17111.00	12.7%	17519.16
Bid Corporation	32667.00	34399.00	-5.0%	22355.69	Reinet Investments	28604.00	24721.00	15.7%	8898.10
Redefine Properties	453.00	479.00	-5.4%	4873.97	Prosus	132659.00	114101.00	16.3%	135696.49

## Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₫)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₫)
Khang Dien House Trading & Investment	44900.00	1.4%	68.6%	188.902.25	Vietjet Aviation	131800.00	-3.0%	47.3%	116239.97
Hoa Phat Group JSC	57200.00	0.5%	87.3%	2,256.547.05	Saigon Beer Alcohol Beverage Corp.	152000.00	-2.1%	-22.1%	34535.04
Phat Dat Real Estate Development Corp	96700.00	0.3%	130.7%	462.198.48	Masan Group Corp	140200.00	-2.0%	59.1%	153.437.25
					PetroVietnam Power Corp	12050.00	-2.0%	-11.4%	158.898.35
					Petrovietnam Gas	112200.00	-2.0%	33.7%	185.551.52
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	131800.00	131800.00	0.0%	116239.97	Military Commercial Bank	27900.00	27900.00	0.0%	286.766.14
Vingroup JSC	91000.00	91000.00	0.0%	260569.37	Vietnam National Petroleum Group	53500.00	53500.00	0.0%	60.662.46
Techcombank	52900.00	52900.00	0.0%	816926.19	PetroVietnam Power Corp	12050.00	12050.00	0.0%	158.898.35
Phu Nhuan Jewelry	98000.00	98000.00	0.0%	64175.35	Sai Gon Thuong Tin Commercial	26100.00	26100.00	0.0%	227.832.85
Phat Dat Real Estate Development Corp	96700.00	96700.00	0.0%	462.198.48	Tien Phong Commercial Joint Stock Bank	43700.00	43700.00	0.0%	155.004.55

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