

Daily Market Report



Monday February 15, 2021

Equities market Begins Trading week on a Positive Note...ASI Gains 33 Basis Point

The Nigerian Stock Exchange (NSE) closed positive as bulls dominated proceedings in the market today. The benchmark All Share Index (ASI) appreciated by 0.33% to close at 40,573.31. Similarly, Market Capitalization increased by N69 billion to close at N21.23 trillion while the Year-to-Date (YtD) returns settled at 0.75%.

What shaped today's market direction?

Today's positive market direction can be largely attributed to gains recorded in large and mid-cap stocks in the Insurance, Banking, Oil and gas and industrial sector. Some of today's market advancers include: **SEPLAT (10.00%)**, **UCAP (6.02%)**, **ECOBANK (4.55%)**, **UBA (4.27%)**, **ACCESS (3.07%)**, **WAPCO (3.03%)**, **FIDELITY (2.08%)**, **GUARANTY (1.32%)**, **FBNH (0.69%)** and **ZENITH (0.33%)** among others.

Sectors performance was Significantly Bullish

Performance across sectors was significantly bullish as 4 out of the 5 sectors closed in the green zone. Insurance, Banking, Oil and gas and industrial indices advanced by 1.38%, 1.81%, 5.35% and 0.35% respectively, on the back of buy interests recorded in the shares of **SEPLAT (10.00%)**, **UCAP (6.02%)**, **ECOBANK (4.55%)**, **UBA (4.27%)**, **ACCESS (3.07%)**, **WAPCO (3.03%)**, **FIDELITY (2.08%)**, **GUARANTY (1.32%)**, **FBNH (0.69%)** and **ZENITH (0.33%)** among others. While Consumer goods index declined on the back of sell pressure in the shares of **DANGSUGAR (-1.04%)**, **HONYFLOUR (-0.77%)** and **GUINNESS (-0.50%)**.

Market activity measured by aggregate volume decreased by 47.77% while value decreased by 58.05%. Investors traded a total of 203 million units of shares valued at N2.13 billion in 4,178 deals.

Market breadth measured by Advancers/Decliners was positive as it closed at 3.50x indicating a bullish mood. At the close of trading : **SEPLAT (10.00%)**, **UCAP (6.02%)**, **ECOBANK (4.55%)**, **UBA (4.27%)**, **ACCESS (3.07%)**, **WAPCO (3.03%)**, **FIDELITY (2.08%)**, **GUARANTY (1.32%)**, **FBNH (0.69%)** and **ZENITH (0.33%)** were the 30 market gainers, while **CONOIL (-10.00%)**, **RTBRISCOE (-9.09%)**, **CHIPLC (-8.70%)**, **SOVERINS (-7.69%)**, **VERITAS (-4.76%)**, **WEMA (-1.52%)**, **MTNN (-1.10%)**, **DANGSUGAR (-1.04%)**, **HONYFLOUR (-0.77%)** and **GUINNESS (-0.50%)** were amongst the 12 market laggards. 63 stock prices remained unchanged.

The Banking sector emerged as the most active sector. Equities of Zenith, Guaranty and Fidelity were the most active in the subsector as 43 million units of shares worth N867 million were traded in 868 transactions. Equities of Zenith, Guaranty and Fidelity accounted for 70% of the total volume traded in the subsector.

Other Financial Institutions came second ahead of Insurance. Equities of FBNH and UCAP were the most active in the subsector as 20 million units of shares worth N135 million were traded in 289 transactions. Trading in the Equities of FBNH and UCAP accounted for 68% of the total volume traded in the subsector.

NASD Market

The NASD market closed positive after today's trading activities as the Unlisted Securities Index (USI) increased by 0.37% to close at 738.59. Consequently, Market Capitalization also closed positive at N529.95 billion. Market activity measured by aggregate volume increased by 621.62% while value increased by 3,285.68%. Investors traded a total of 99,583 units of shares valued at N7.48mn in 3 deals.

NSE Market Indices

All Share Index	40,573.31
Previous ASI	40,439.85
% Day Change	0.33%
% Weekly Change	0.33%
No. of Deals	4,178.00
Volume	202,803,744.00
Value	2,126,618,293.87
Market Capitalization	21,225,712,908,153.40
1 Month High	42,412.66
1 Month Low	40,120.22

NSE Top Five Gainers

Symbols	Daily ▲	Price (₦)
SEPLAT	49.50	544.5
WAPCO	0.75	25.5
JBERGER	0.50	18.5
GUARANTY	0.40	30.75
UBA	0.35	8.55

NSE Top Five Losers

Symbols	Daily ▼	Price (₦)
CONOIL	-2.10	18.9
MTNN	-2.00	180
DANGSUGAR	-0.20	19
GUINNESS	-0.10	20.1
CHIPLC	-0.04	0.42

NSE Top Five Trades

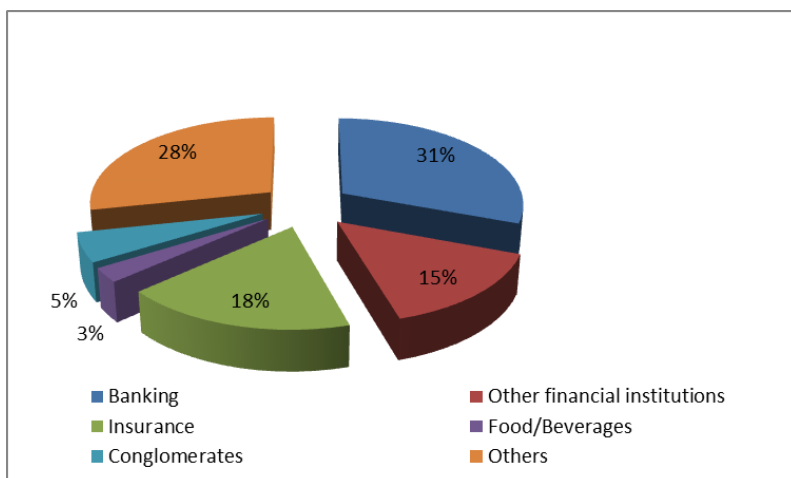
Symbols	Price (₦)	Volume
ZENITHBANK	25.05	19,347,942.00
UAC-PROP	0.85	14,443,080.00
MBENEFIT	0.46	13,204,680.00
FIDELITYBK	2.45	12,875,507.00
GUARANTY	30.75	11,431,118.00

NASD Market Summary

Symbols	Price (₦)	Volume
SDNDEPLC	308.50	279,756
SDFCWAMCO	135.00	1,926,927
SDUBNPROP	1.26	15,082,700
SDCSCSPLC	16.00	2,406,530
SDVFDGROUP	105.07	199,094

Daily Market Report for 15022021

TOP SIX SUBSECTORS BY VOLUME TRADES



CBN OFFICIAL RATES AS AT TODAY

CURRENCY	BID	OFFER
US DOLLAR	379.00	380.00
POUNDS	522.41	523.79
EURO	458.93	460.14

AUTONOMOUS MARKET (CASH)

US DOLLAR	465	473
POUNDS	642	652
EURO	562	570

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	31,458.40	0.09%
S&P 500 Index	3,934.83	0.47%
FTSE 100 Index	6,743.80	2.34%
CAC 40 Index	5,797.30	1.64%
NIKKEI 225	30,084.15	1.91%
DAX index	14,109.99	0.43%

CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
Neimeth Int Pharma	N0.065	Nil	22nd – 28th Feb, 2021	9th March, 2021	12th March, 2021
Vitafoam Plc	N0.70	Nil	15th February, 2021	4th March, 2021	5 th March, 2021

CORPORATE NEWS

❖ ECOBANK TRANSNATIONAL INC. RECORDS 24% INCREASE IN PROFIT AFTER TAX FOR Q4 2020

Ecobank Transnational Inc. has reported a Profit After Tax (PAT) of N25.6 billion in the fourth quarter of 2020 (Q4, 2020) compared to N20.6 billion recorded in a similar period of 2019, indicating a rise in profit by 24.1% Year-on-Year.

NOTE: The Global market indices are reported at the time of compiling the report and not when the various bourses closed session.

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GLOSSARY

WORDS	MEANING
NASD	National Association of Securities Dealers
Bearish	Decline in prices, negative sentiments, downward trend
Bullish	Surge in prices, positive sentiments, upward trend
Y-o-Y	Year-on-Year
M-o-M	Month-on-Month
Y-t-d	Year-to-date
W-o-W	Week-on-week
BPS	Basis Points

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