

Daily Market Report



Tuesday June 22, 2021

Equities market closes on a negative note ...ASI loses 181 Basis Point

The Nigerian Stock Exchange (NSE) closed negative as bears dominated proceedings in the market today. The benchmark All Share Index (ASI) depreciated by 1.81% to close at 37,847.07. Similarly, Market Capitalization decreased by 363 billion to close at N19.72 trillion while the Year-to-Date (YtD) returns settled at -6.02%.

What shaped today's market direction?

Today's market direction can be largely attributed to losses recorded in large and mid-cap stocks in Banking, Agriculture and Consumer goods sector. Some of today's market losers include: AIRTELAFRI (-10.00%), MBENEFIT (-7.32%), PZ (-5.17%), HONYFLOUR (-2.78%), BUACEMENT (-2.71%), UAC-PROP (-2.41%), NAHCO (-2.17%), FBNH (-2.05%), TRANSCORP (-1.10%), NASCON (-1.03%), UACN (-1.01%), STANBIC (-0.88%), ZENITHBANK (-0.42%) and FLOURMILL (-0.33%) amongst others.

Sectors performance was Broadly Bearish

Performance across sectors was broadly bearish as 3 out of 5 sectors closed in the red zone. Industrial, Insurance & Banking Indices declined by 1.13%, 0.39% and 0.07% respectively. While Oil & Gas and Consumer Goods Indices advanced by 0.05% and 0.02% respectively.

Market activity measured by aggregate volume increased by 4.33% while value increased by 54.59%. Investors traded a total of 218 million units of shares valued at N2.72 billion in 3,524 deals.

Market breadth measured by Advancers/Decliners was positive as it closed at 0.78x indicating a bullish mood. At the close of trading : FIDSON (10.00%), VITAFOAM (9.68%), VERITASKAP (9.09%), JAPAULGOLD (4.08%), WEMABANK (3.64%), AIICO (0.92%), GLAXOSMITH (0.83%), LASACO (0.74%), OANDO (0.68%), FIDELITYBK (0.44%) and NB (0.34%) were amongst the 18 market gainers, while AIRTELAFRI (-10.00%), MBENEFIT (-7.32%), PZ (-5.17%), HONYFLOUR (-2.78%), BUACEMENT (-2.71%), UAC-PROP (-2.41%), NAHCO (-2.17%), FBNH (-2.05%), TRANSCORP (-1.10%), NASCON (-1.03%), UACN (-1.01%), STANBIC (-0.88%), ZENITHBANK (-0.42%) and FLOURMILL (-0.33%) were the 23 market laggards. 55 stock prices remained unchanged.

The Banking sector emerged as the most active sector. Equities of Access, Zenith and Sterlingbank were the most active in the subsector as 51 million units of shares worth N436 Million were traded in 1,745 transactions. Access, Zenith and Sterlingbank accounted for 63% of the total volume traded in the subsector.

Conglomerates came second ahead of Other Financial Institutions. Equities of TRANSCORP and UACN were the most active in the subsector as 44 million units of shares worth N56 million were traded in 455 transactions. Trading in the Equities of TRANSCORP and UACN accounted for 99% of the total volume traded in the subsector.

NASD Market

The NASD market closed negative after today's trading activities as the Unlisted Securities Index (USI) decreased by 0.93% to close at 738.91. Consequently, Market Capitalization closed at N525.23 billion. Market activity measured by aggregate volume decreased by 59.71% while value decreased by 55.35%. Investors traded a total of 366,354 units of shares valued at N8.26 million in 20 deals.

NSE Market Indices

All Share Index	37,847.07
Previous ASI	38,545.30
% Day Change	-1.81%
% Weekly Change	-2.07%
No. of Deals	3,524.00
Volume	218,271,039.00
Value	2,725,787,343.36
Market Capitalization	19,725,249,041,684.10
1 Month High	39,210.10
1 Month Low	37,847.07

NSE Top Five Gainers

Symbols	Daily ▲	Price (₦)
VITAFOAM	1.20	13.60
FIDSON	0.46	5.06
REDSTAREX	0.32	3.67
NB	0.20	59.20
UPDCREIT	0.05	5.65

NSE Top Five Losers

Symbols	Daily ▼	Price (₦)
AIRTELAFRI	-75.3	678.00
PRESCO	-3.40	72.60
BUACEMENT	-1.95	70.00
STANBIC	-0.35	39.55
PZ	-0.30	5.50

NSE Top Five Trades

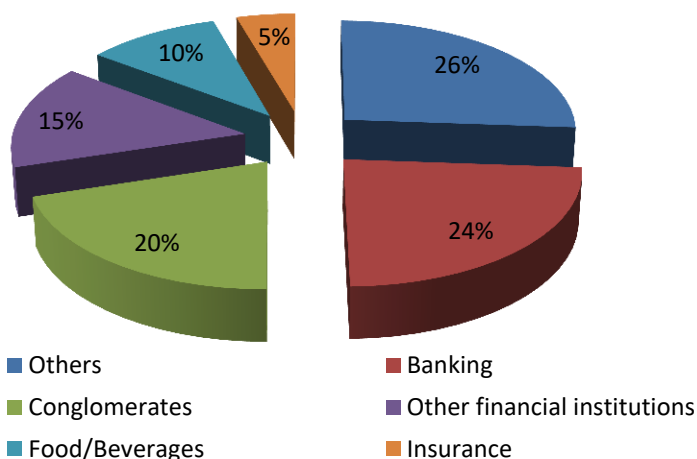
Symbols	Price (₦)	Volume
TRANSCORP	0.90	42,441,801
VITAFOAM	13.60	20,131,094
DANGSUGAR	17.70	17,633,708
FBNH	7.15	12,391,712
ACCESS	8.55	11,516,579

NASD Market Summary

Symbols	Price (₦)	Volume
SDCSCSPLC	17	40,154
SDFCWAMCO	116.17	13,700
SDNGXGROUP	18.93	312,500

Daily Market Report for 22062021

TOP SIX SUBSECTORS BY VOLUME TRADES



CBN OFFICIAL RATES AS AT TODAY

CURRENCY	BID	OFFER
US DOLLAR	409	410
POUNDS	580	581
EURO	498	500

AUTONOMOUS MARKET (CASH)

US DOLLAR	485	495
POUNDS	700	718
EURO	580	603

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	33,876.97	1.76%
S&P 500 Index	4,224.79	1.40%
FTSE 100 Index	7,088.79	0.38%
CAC 40 Index	6,606.62	0.06%
NIKKEI 225	28,884.13	3.12%
DAX index	15,615.11	0.08%

CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
MTNN Plc	N5.90	Nil	5 th May, 2021	25 th May, 2021	26 th May, 2021
Wapco Plc	N1.00	Nil	4 th -7 th May, 2021	25 th May, 2021	25 th May, 2021
DangCem Plc	N16.00	Nil	27 th April, 2021	26 th May, 2021	27 th May, 2021
SAHCO Plc	N0.165	Nil	7 th June, 2021	22 nd June, 2021	22 nd June, 2021
Presco Plc	N2.00	Nil	7 th July, 2021	21 st July, 2021	26 th July, 2021
McNichols	N0.03	Nil	1 st July, 2021	29 th July, 2021	5 th Aug, 2021
Bua Cement Plc	N2.067	Nil	12 th -16 th July, 2021	22 nd July, 2021	23 rd July, 2021
NAHCO Plc	N0.13	Nil	14 th July, 2021	30 th July, 2021	30 th July 2021
STANBIC PLC	N3.60	Nil	8 th -15 th April, 2021	27 th May, 2021	28 th May, 2021

CORPORATE NEWS

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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