

Daily Market Report



Wednesday June 23, 2021

Equities market closes on a negative note ...ASI loses 11 Basis Point

The Nigerian Exchange Limited (NGX) closed negative as bears dominated proceedings in the market today. The benchmark All Share Index (ASI) depreciated by 0.11% to close at 37,804.46. Similarly, Market Capitalization decreased by 22 billion to close at N19.70 trillion while the Year-to-Date (YtD) returns settled at -6.12%.

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: **JAPAULGOLD (-9.80%), ACCESS (-2.34%), ETI (-1.94%), FCMB (-1.90%), AIICO (-1.82%), OANDO (-1.36%), ZENITHBANK (-1.26%), STERLNBANK (-1.24%), TRANSCORP (-1.11%), FBNH (-0.70%) and UACN (-0.51%) amongst others.**

Sectors performance was Broadly Bearish

Performance across sectors was broadly bearish as 3 out of 5 sectors closed in the red zone. Oil & Gas, Insurance & Banking Indices declined by 0.10%, 0.51% and 0.75% respectively. While Consumer Goods Index advanced by 0.16%.

Market activity measured by aggregate volume decreased by 4.54% while value decreased by 41.21%. Investors traded a total of 208 million units of shares valued at N1.60 billion in 3,365 deals.

Market breadth measured by Advancers/Decliners was positive as it closed at 0.48x indicating a bullish mood. At the close of trading : **FTNCOCOA (10.00%), IKEJAHOTEL (9.89%), VITAFOAM (4.78%), HONYFLOUR (2.86%), DANGSUGAR (1.13%) and FIDELITY (0.88%)** were amongst the 11 market gainers, while **JAPAULGOLD (-9.80%), ACCESS (-2.34%), ETI (-1.94%), FCMB (-1.90%), AIICO (-1.82%), OANDO (-1.36%), ZENITHBANK (-1.26%), STERLNBANK (-1.24%), TRANSCORP (-1.11%), FBNH (-0.70%) and UACN (-0.51%) amongst others** were the 23 market laggards. 65 stock prices remained unchanged.

The Banking sector emerged as the most active sector. Equities of Access, Zenith and Fidelity were the most active in the subsector as 71 million units of shares worth N949 Million were traded in 1,785 transactions. Access, Zenith and Fidelity accounted for 79% of the total volume traded in the subsector.

Other Financial Institutions came second ahead of Insurance. Equities of Royalex and FBNH were the most active in the subsector as 36 million units of shares worth N136 million were traded in 1,038 transactions. Trading in the Equities of Royalex and FBNH accounted for 63% 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 2.33% to close at 756.13. Consequently, Market Capitalization closed at N537.47 billion. Market activity measured by aggregate volume increased by 329.68% while value increased by 313.05%. Investors traded a total of 1,574,133 units of shares valued at N34.11 million in 34 deals.

NGX Market Indices

All Share Index	37,804.46
Previous ASI	37,847.07
% Day Change	-0.11%
% Weekly Change	-2.18%
No. of Deals	3,365.00
Volume	208,356,245.00
Value	1,602,520,410.91
Market Capitalization	19,703,041,158,420.60
1 Month High	39,210.10
1 Month Low	37,804.46

NGX Top Five Gainers

Symbols	Daily ▲	Price (₦)
VITAFOAM	0.65	14.25
DANGSUGAR	0.20	17.90
IKEJAHOTEL	0.09	1.00
CORNERST	0.05	0.56
LINKASSURE	0.05	0.60

NGX Top Five Losers

Symbols	Daily ▼	Price (₦)
ZENITHBANK	-0.30	23.5
ACCESS	-0.20	8.35
ETRANZACT	-0.19	2.06
UPL	-0.16	1.52
ETI	-0.10	5.05

NGX Top Five Trades

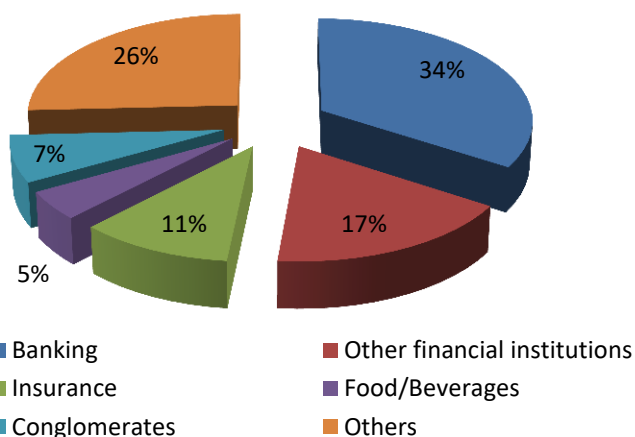
Symbols	Price (₦)	Volume
ZENITHBANK	23.50	33,681,963
ETRANZACT	2.06	20,950,266
FIDELITYBK	2.30	13,679,744
ROYALEX	0.63	13,116,970
JAPAULGOLD	0.46	13,002,096

NASD Market Summary

Symbols	Price (₦)	Volume
SDAFRILAND	1.25	22,500
SDCSCSPLC	18.7	9,480
SDFCWAMCO	120	49,358
SDNGXGROUP	18.75	1,492,795

Daily Market Report for 23062021

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	605

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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