

Daily Market Report



Friday August 06, 2021

Equities market closes on a Flat note... ASI gains 2 Basis Point

The Nigerian Exchange Limited (NGX) closed Flat. The benchmark All Share Index (ASI) appreciated by 0.02% to close at 38,810.75. Market Capitalization increased by 4 Billion to close at N20.22 trillion while the Year-to-Date (YtD) returns settled at -3.63%.

What shaped today's market direction?

Today's market direction can be largely attributed to gains recorded in large and mid-cap stocks in Banking, Industrial and Consumer goods sector. Some of today's market gainers include: **TRANSCOHOT (9.80%)**, **OANDO (4.13%)**, **ARDOVA (3.33%)**, **CUTIX (2.73%)**, **TRANSCORP (2.15%)**, **JAIZBANK (1.64%)**, **STERLNBANK (1.31%)**, **ETI (0.93%)** and **GUINNESS (0.63%)** amongst others.

Sectors performance was Broadly Bearish

Performance across sectors was broadly bearish as 3 out of 5 sectors closed in the red zone. Banking, Insurance and Consumer Goods Indices declined by 0.05%, 0.39% and 0.04% respectively. Oil and Gas Index advanced by 0.95%. While Industrial Index remained unchanged.

Market activity measured by aggregate volume increased by 29.78% while value increased by 21.79%. Investors traded a total of 167 million units of shares valued at N1.66 billion in 3,267 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.91x indicating a bearish mood. At the close of trading: **TRANSCOHOT (9.80%)**, **OANDO (4.13%)**, **ARDOVA (3.33%)**, **CUTIX (2.73%)**, **TRANSCORP (2.15%)**, **JAIZBANK (1.64%)**, **STERLNBANK (1.31%)**, **ETI (0.93%)** and **GUINNESS (0.63%)** were amongst the 10 market gainers, **AFRIPRUD (-5.51%)**, **VITAFOAM (-2.60%)**, **WEMABANK (-2.25%)**, **MANSARD (-1.10%)**, **NAHCO (-0.79%)**, **FCMB (-0.64%)**, **FIDELITYBK (-0.42%)** and **ZENITHBANK (-0.20%)** amongst others were the 11 market laggards. 69 stock prices remained unchanged.

Other Financial Institutions sector emerged as the most active sector. Equities of FBNH, GTCO and FCMB were the most active in the subsector as 69 million units of shares worth N707 Million were traded in 1365 transactions. FBNH, GTCO and FCMB accounted for 77% of the total volume traded in the subsector.

Banking sector came second ahead of Insurance. Equities of WEMABANK and ZENITHBANK were the most active in the subsector as 38 million units of shares worth N254 million were traded in 1378 transactions. Trading in the Equities of WEMABANK and ZENITHBANK accounted for 47% 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) declined by 0.09% to close at 752.81. Consequently, Market Capitalization closed at 654.32 billion. Market activity measured by aggregate volume decreased by 73.09% while value increased by 40.01%. Investors traded a total of 1,545,384 units of shares valued at N25 million in 13 deals.

NGX Market Indices

All Share Index	38,810.75
Previous ASI	38,801.51
% Day Change	0.02%
% Weekly Change	0.68%
No. of Deals	3,267.00
Volume	167,778,140
Value	1,663,548,520.52
Market Capitalization	20,220,966,425,612.40
1 Month High	38,927.83
1 Month Low	37,857.24

NGX Top Five Gainers

Symbols	Daily ▲	Price (₦)
ARDOVA	0.50	15.50
TRANSCOHOT	0.35	3.92
GUINNESS	0.20	31.70
OANDO	0.19	4.79
CUTIX	0.15	5.65

NGX Top Five Losers

Symbols	Daily ▼	Price (₦)
VITAFOAM	-0.40	15.00
AFRIPRUD	-0.35	6.00
ZENITHBANK	-0.05	24.35
CAVERTON	-0.02	1.80
CHIPLC	-0.02	0.59

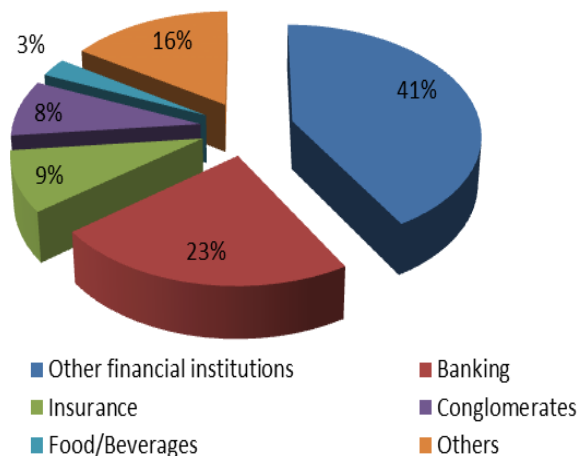
NGX Top Five Trades

Symbols	Price (₦)	Volume
FBNH	7.30	27,279,144
GTCO	28.00	14,383,404
TRANSCORP	0.95	13,025,267
FCMB	3.10	12,260,805
WEMABANK	0.87	12,085,343

NASD Market Summary

Symbols	Price (₦)	Volume
SDFCWAMCO	127	1,910
SDFSTRUSTMB	0.57	200
SDNGXGROUP	16.53	1,541,274
SDNIPCOPLC	70	2,000

TOP SIX SUBSECTORS BY VOLUME TRADES



CBN OFFICIAL RATES AS AT TODAY

CURRENCY	BID	OFFER
US DOLLAR	409.00	410.00
POUNDS	568.00	570.00
EURO	486.00	487.00

AUTONOMOUS MARKET (CASH)

US DOLLAR	500.00	508.00
POUNDS	700.00	705.00
EURO	590.00	598.00

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	35,064.25	0.78%
S&P 500 Index	4,429.10	0.60%
FTSE 100 Index	7,122.74	0.03%
CAC 40 Index	6,797.47	0.24%
NIKKEI 225	27,820.04	0.33%
DAX index	15,769.02	0.15%

CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
FLOURMILLS Plc	N1.65	Nil	16th August, 2021	8th Sept, 2021	9th Sept, 2021
UPL Plc	N0.05	Nil	1st Sept, 2021	23th Sept, 2021	23th Sept, 2021
TRIPPLE GEE Plc	N0.07	Nil	24th August, 2021	15th Sept, 2021	9th Sept, 2021
LASACO Plc	N0.10	Nil	6th August, 2021	26th August, 2021	30th August, 2021
Presco Plc	N2.00	Nil	7th July, 2021	21st July, 2021	26th July, 2021
McNichols	N0.03	Nil	1st July, 2021	29th July, 2021	5th Aug, 2021
LEARN AFRICA PLC	N0.15	Nil	11th Oct, 2021	21st Oct, 2021	22nd Oct, 2021
FLOURMILLS Plc	N1.65	Nil	16th August, 2021	8th Sept, 2021	9th Sept, 2021

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

MBC Securities Limited

11th Floor, St. Nicholas House,
5/6, Catholic Mission Street,
Lagos Island, Lagos
Nigeria
+234 1 270800324

www.mbcgroup.com.ng

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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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5/6, Catholic Mission Street,
Lagos Island, Lagos
Nigeria

+234 1 270800324

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