

# Daily Market Report



Friday August 20, 2021

## Equities market closes on a Negative note... ASI loses 47 Basis Point

The Nigerian Exchange Limited (NGX) closed Negative. The benchmark All Share Index (ASI) depreciated by 0.47% to close at 39,483.08. Market Capitalization decreased by 97.54 Billion to close at N20.57 trillion while the Year-to-Date (YtD) returns settled at -1.96%.

### 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, Industrial and Consumer goods sector. Some of today's market losers include: **FTNCOCOA (-6.98%), UPL (-6.20%), CADBURY (-5.03%), INTBREW (-4.00%), SOVRENINS (-3.85%), JAIZBANK (-3.33%), WAPCO (-1.30%), OANDO (-1.21%), ACCESS (-1.10%), CAVERTON (-1.10%), TRANSCORP (-1.02%) and UBA (-0.66%) amongst others.**

### Sectors performance was Broadly Bearish.

Performance across sectors was broadly bearish as 4 out of 5 sectors closed in the red zone. Banking, Industrial, Oil & Gas and Consumer Goods Indices declined by 0.18%, 0.08%, 0.16% and 0.46% respectively. While Insurance Index advanced by 0.28%.

Market activity measured by aggregate volume increased by 39.01% while value decreased by 89.48%. Investors traded a total of 280 million units of shares valued at N3.18 billion in 4,012 deals.

Market breadth measured by Advancers/Decliners was Positive as it closed at 1.40x indicating a Bullish mood. At the close of trading **LASACO (10.00%), NEIMETH (9.63%), UACN (9.57%), UNITYBNK (7.14%), ETERNA (2.75%), WAPIC (2.04%), FCMB (1.98%), VITAFOAM (1.59%), WEMABANK (1.15%), NAHCO (0.67%), HONYFLOUR (0.67%), UCAP (0.58%), GTCO (0.36%) and ZENITHBANK (0.21%)** were amongst the 21 market gainers, **FTNCOCOA (-6.98%), UPL (-6.20%), CADBURY (-5.03%), INTBREW (-4.00%), SOVRENINS (-3.85%), JAIZBANK (-3.33%), WAPCO (-1.30%), OANDO (-1.21%), ACCESS (-1.10%), CAVERTON (-1.10%), TRANSCORP (-1.02%) and UBA (-0.66%)** amongst others were the 15 market laggards. 61 stock prices remained unchanged.

Other Financial Institutions sector emerged as the most active sector. Equities of GTCO, JAIZBANK and FCMB were the most active in the subsector as 83 million units of shares worth N1.310 Billion were traded in 1223 transactions. GTCO, JAIZBANK and FCMB accounted for 86% of the total volume traded in the subsector.

Food and Beverages sector came second ahead of Insurance. Equities of HONYFLOUR and CADBURY were the most active in the subsector as 59 million units of shares worth N303 million were traded in 1267 transactions. Trading in the Equities of HONYFLOUR and CADBURY accounted for 98% 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 0.11 % to close at 736.07. Consequently, Market Capitalization closed at 639.77 billion. Market activity measured by aggregate volume increased by 56.67% while value increased by 166.26%. Investors traded a total of 1,851,170 units of shares valued at N31.72 million in 26 deals.

## NGX Market Indices

All Share Index	39,483.08
Previous ASI	39,670.29
% Day Change	-0.47%
% Weekly Change	-0.10%
No. of Deals	4,012
Volume	280,574,505
Value	3,183,645,733.22
Market Capitalization	20,571,258,087,281.20
1 Month High	39,670.29
1 Month Low	38,484.82

## NGX Top Five Gainers

Symbols	Daily ▲	Price (₦)
UACN	1.00	11.45
VITAFOAM	0.25	16.00
NEIMETH	0.18	2.05
ETERNA	0.17	6.35
PHARMDEKO	0.15	1.72

## NGX Top Five Losers

Symbols	Daily ▼	Price (₦)
CADBURY	-0.45	8.50
WAPCO	-0.30	22.70
INTBREW	-0.20	4.80
ACCESS	-0.10	9.00
UPL	-0.08	1.21

## NGX Top Five Trades

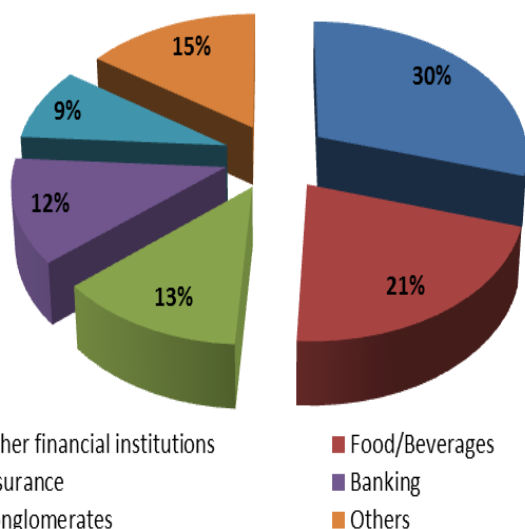
Symbols	Price (₦)	Volume
HONYFLOUR	3.00	57,498,617
GTCO	28.10	42,639,188
JAIZBANK	0.58	22,427,806
MBENEFIT	0.33	16,196,442
TRANSCORP	0.97	14,392,633

## NASD Market Summary

Symbols	Price (₦)	Volume
SD11PLC	220.00	1,640
SDCSCSPLC	16.58	276,750
SDFCWAMCO	120.00	2,528
SDMIXREAL	1.97	29,900
SDNGXGROUP	17.14	1,540,352

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## 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	512.00	520.00
POUNDS	703.00	708.00
EURO	602.00	606.00

### GLOBAL MARKET INDICES\*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	34,894.12	-0.19%
S&P 500 Index	4,405.80	0.13%
FTSE 100 Index	7,050.43	-0.12%
CAC 40 Index	6,589.82	-0.24%
NIKKEI 225	27,013.25	-0.98%
DAX index	15,706.03	-0.38%

## 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.

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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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