

Daily Market Report



Monday August 30, 2021

Equities market closes on a Negative note... ASI loses 40 Basis Point

The Nigerian Exchange Limited (NGX) closed Negative. The benchmark All Share Index (ASI) depreciated by 0.40% to close at 39,326.67. Market Capitalization decreased by 82.83 Billion to close at N20.489 trillion while the Year-to-Date (YtD) returns settled at -2.34%.

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: **CHAMPION (-7.73%), ETERNA (-7.20%), OANDO (-5.00%), ETI (-3.67%), DANGCEM (-2.64%), TRANSCORP (-2.17%), UNITYBNK (-1.67%), ACCESS (-1.10%), FCMB (-0.65%), ZENITHBANK (-0.65%), FIDELITYBK (-0.42%) and GTCO (-0.18%) 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, Oil & Gas and Consumer Goods Indices declined by 0.15%, 1.15% and 0.20% respectively. Insurance Index advanced by 0.84%. While Industrial Index remained unchanged.

Market activity measured by aggregate volume increased by 29.27% while value decreased by 17.03%. Investors traded a total of 301 million units of shares valued at N1.54 billion in 4,715 deals.

Market breadth measured by Advancers/Decliners was Positive as it closed at 1.17x indicating a Bullish mood. At the close of trading **HONYFLOUR (9.86%), PRESCO (8.90%), NB (5.58%), AIICO (5.10%), UBN (4.90%), JAIZBANK (1.61%), MANSARD (1.15%), WEMABANK (1.12%), JBERGER (1.00%), UACN (0.91%), DANGSUGAR (0.84%), UBA (0.67%) and VITAFOAM (0.61%)** were amongst the 21 market gainers, **CHAMPION (-7.73%), ETERNA (-7.20%), OANDO (-5.00%), ETI (-3.67%), DANGCEM (-2.64%), TRANSCORP (-2.17%), UNITYBNK (-1.67%), ACCESS (-1.10%), FCMB (-0.65%), ZENITHBANK (-0.65%), FIDELITYBK (-0.42%) and GTCO (-0.18%)** amongst others were the 18 market laggards. 64 stock prices remained unchanged.

Conglomerates sector emerged as the most active sector. Equities of TRANSCORP, UACN and UNILEVER were the most active in the subsector as 54 million units of shares worth N76 million were traded in 663 transactions. TRANSCORP, UACN and UNILEVER accounted for 99% of the total volume traded in the subsector.

Insurance sector came second ahead of Food and Beverages. Equities of CHIPLC and SOVRENINS were the most active in the subsector as 47 million units of shares worth N25 million were traded in 665 transactions. Trading in the Equities of CHIPLC and SOVRENINS accounted for 60% 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) advanced by 0.14% to close at 735.35. Consequently, Market Capitalization closed at 639.15 billion. Market activity measured by aggregate volume decreased 87.92% while value decreased by 86.43%. Investors traded a total of 395,603 units of shares valued at N7.49 million in 20 deals.

NGX Market Indices

| | |
|-----------------------|-----------------------|
| All Share Index | 39,326.67 |
| Previous ASI | 39,485.65 |
| % Day Change | -0.40% |
| % Weekly Change | -0.40% |
| No. of Deals | 4,715 |
| Volume | 301,014,307 |
| Value | 1,535,431,439.55 |
| Market Capitalization | 20,489,835,145,218.08 |
| 1 Month High | 39,670.29 |
| 1 Month Low | 38,567.26 |

NGX Top Five Gainers

| Symbols | Daily ▲ | Price (₦) |
|-----------|---------|-----------|
| PRESCO | 6.50 | 79.50 |
| NB | 2.90 | 54.90 |
| HONYFLOUR | 0.35 | 3.90 |
| JBERGER | 0.25 | 25.25 |
| UBN | 0.25 | 5.35 |

NGX Top Five Losers

| Symbols | Daily ▼ | Price (₦) |
|----------|---------|-----------|
| DANGCEM | -6.60 | 243.00 |
| ETERNA | -0.54 | 6.96 |
| OANDO | -0.24 | 4.56 |
| ETI | -0.20 | 5.25 |
| CHAMPION | -0.17 | 2.03 |

NGX Top Five Trades

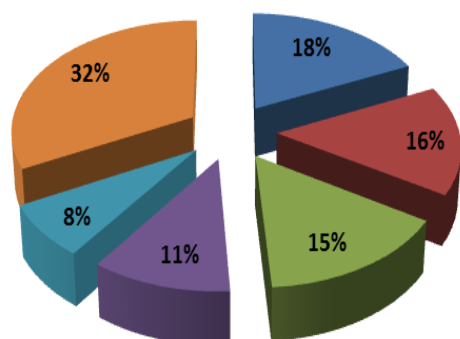
| Symbols | Price (₦) | Volume |
|-----------|-----------|------------|
| TRANSCORP | 0.90 | 51,690,635 |
| HONYFLOUR | 3.90 | 43,733,069 |
| CHIPLC | 0.60 | 17,606,438 |
| OANDO | 4.56 | 16,118,706 |
| UPDC | 2.01 | 15,113,606 |

NASD Market Summary

| Symbols | Price (₦) | Volume |
|------------|-----------|---------|
| SDAFRILAND | 1.33 | 5,000 |
| SDCSCSPLC | 17.78 | 70,510 |
| SDFCWAMCO | 115.10 | 10,753 |
| SDNGXGROUP | 16.12 | 309,140 |
| SDNIPCOPLC | 77.00 | 200 |

Daily Market Report for 300821

TOP SIX SUBSECTORS BY VOLUME TRADES



■ Conglomerates
■ Food/Beverages
■ Other financial institutions
■ Insurance
■ Banking
■ Others

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 | 520.00 | 527.00 |
| POUNDS | 710.00 | 715.00 |
| EURO | 605.00 | 612.00 |

GLOBAL MARKET INDICES*

| MARKET | TODAY'S CLOSE | % CHANGE |
|----------------|---------------|----------|
| DJIA | 35,479.02 | 0.07% |
| S&P 500 Index | 4,529.35 | 0.44% |
| FTSE 100 Index | 7,148.01 | 0.32% |
| CAC 40 Index | 6,688.82 | 0.10% |
| NIKKEI 225 | 27,789.29 | 0.54% |
| DAX index | 15,884.97 | 0.21% |

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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