

Daily Market Report



Wednesday September 15, 2021

Equities market closes on a Positive note... ASI gains 12 Basis Point

The Nigerian Exchange Limited (NGX) closed Positive. The benchmark All Share Index (ASI) appreciated by 0.12% to close at 38,968.34. Market Capitalization increased by 24.93 Billion to close at N20.30 trillion while the Year-to-Date (YtD) returns settled at -3.23%.

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: **UPDC (9.64%), NNFM (9.59%), OANDO (6.21%), HONYFLOUR (3.83%), TRANSCORP (2.22%), NAHCO (1.69%), MTNN (1.45%), FBNH (1.33%), GTCO (0.74%), MAYBAKER (0.67%) and UCAP (0.61%) 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 Oil & Gas Indices declined by 0.39%, 1.15% and 2.00% respectively. Consumer Goods Index advanced by 0.09%. While Industrial Index remained unchanged.

Market activity measured by aggregate volume decreased by 38.11% while value increased by 58.27%. Investors traded a total of 141 million units of shares valued at 2.97 billion in 3,079 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.78x indicating a Bearish mood. At the close of trading **UPDC (9.64%), NNFM (9.59%), OANDO (6.21%), HONYFLOUR (3.83%), TRANSCORP (2.22%), NAHCO (1.69%), MTNN (1.45%), FBNH (1.33%), GTCO (0.74%), MAYBAKER (0.67%) and UCAP (0.61%)** were amongst the 14 market gainers **TRANSCOHOT (-10.00%), CHAMPION (-8.17%), SEPLAT (-6.54%), UNITYBNK (-5.45%), SOVRENINS (-4.00%), AIICO (-2.04%), STERLNBANK (-1.99%), FIDELITYBK (-1.23%) and ZENITHBANK (-0.63%)** amongst others were the 18 market laggards. 70 stock prices remained unchanged.

Banking sector emerged as the most active sector. Equities of ZENITHBANK, ACCESS and UBA were the most active in the subsector as 33 million units of shares worth N366.84 million were traded in 1,556 transactions. ZENITHBANK, ACCESS and UBA accounted for 71% of the total volume traded in the subsector.

Insurance sector came second ahead of Other Financial Institutions. Equities of UNIVINSURE and MBENEFIT were the most active in the subsector as 29 million units of shares worth N9.73 million were traded in 499 transactions. Trading in the Equities of UNIVINSURE and MBENEFIT accounted for 81% 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 0.15% to close at 735.55. Consequently, Market Capitalization closed at 639.32 billion. Market activity measured by aggregate volume increased 110.07% while value increased by 160.27%. Investors traded a total of 3,923,888 units of shares valued at N39 million in 43 deals.

NGX Market Indices

| | |
|-----------------------|-----------------------|
| All Share Index | 38,968.34 |
| Previous ASI | 38,920.50 |
| % Day Change | 0.12% |
| % Weekly Change | 0.12% |
| No. of Deals | 3,079 |
| Volume | 141,407,914 |
| Value | 2,973,486,877.34 |
| Market Capitalization | 20,303,137,884,264.52 |
| 1 Month High | 39,485.65 |
| 1 Month Low | 38,915.62 |

NGX Top Five Gainers

| Symbols | Daily ▲ | Price (₦) |
|---------|---------|-----------|
| MTNN | 2.50 | 175.00 |
| NNFM | 0.70 | 8.00 |
| OANDO | 0.27 | 4.62 |
| GTCO | 0.20 | 27.20 |
| UPDC | 0.16 | 1.82 |

NGX Top Five Losers

| Symbols | Daily ▼ | Price (₦) |
|------------|---------|-----------|
| SEPLAT | -49.70 | 710.00 |
| TRANSCOHOT | -0.50 | 4.50 |
| CHAMPION | -0.17 | 1.91 |
| ZENITHBANK | -0.15 | 23.65 |
| REDSTAREX | -0.15 | 3.10 |

NGX Top Five Trades

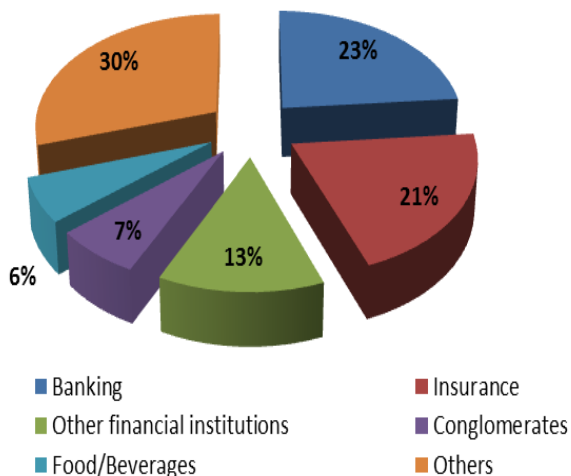
| Symbols | Price (₦) | Volume |
|------------|-----------|------------|
| UNIVINSURE | 0.20 | 17,987,052 |
| ZENITHBANK | 23.65 | 9,711,718 |
| UCAP | 8.20 | 9,341,841 |
| TRANSCORP | 0.92 | 9,082,603 |
| ACCESS | 9.30 | 9,023,766 |

NASD Market Summary

| Symbols | Price (₦) | Volume |
|------------|-----------|-----------|
| SDCSCSPLC | 17.00 | 23,100 |
| SDFCWAMCO | 122.00 | 23,100 |
| SDFOODCPT | 0.75 | 1,000,000 |
| SDNASDPLC | 6.11 | 327,500 |
| SDNGXGROUP | 13.00 | 2,550,188 |

Daily Market Report for 150921

TOP SIX SUBSECTORS BY VOLUME TRADES



CBN OFFICIAL RATES AS AT TODAY

| CURRENCY | BID | OFFER |
|-----------|--------|--------|
| US DOLLAR | 409.00 | 410.00 |
| POUNDS | 563.00 | 564.00 |
| EURO | 483.00 | 484.00 |

AUTONOMOUS MARKET (CASH)

| | | |
|-----------|--------|--------|
| US DOLLAR | 550.00 | 557.00 |
| POUNDS | 754.00 | 760.00 |
| EURO | 638.00 | 645.00 |

GLOBAL MARKET INDICES*

| MARKET | TODAY'S CLOSE | % CHANGE |
|----------------|---------------|----------|
| DJIA | 34,577.57 | -0.84% |
| S&P 500 Index | 4,443.05 | -0.57% |
| FTSE 100 Index | 7,029.16 | -0.07% |
| CAC 40 Index | 6,607.60 | -0.68% |
| NIKKEI 225 | 30,511.71 | -0.52% |
| DAX index | 15,701.51 | -0.14% |

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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