

Daily Market Report



Monday September 27, 2021

Equities market closes on a Negative note... ASI loses 25 Basis Point

The Nigerian Exchange Limited (NGX) closed Negative. The benchmark All Share Index (ASI) depreciated by 0.25% to close at 38,864.33. Market Capitalization decreased by 51.03 Billion to close at N20.25 trillion while the Year-to-Date (YtD) returns settled at -3.49%.

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: **MANSARD (-9.94%), BUACEMENT (-2.94%), TRANSCORP (-1.08%), ETI (-0.94%), UBA (-0.67%), UCAP (-0.58%), GTCO (-0.54%), FIDELITYBK (-0.41%) and ZENITHBANK (-0.21%) amongst others.**

Sectors performance was Broadly Bullish.

Performance across sectors was broadly bullish as 3 out of 5 sectors closed in the green zone. Banking, Consumer Goods and Oil & Gas Indices advanced by 0.40%, 0.03% and 1.42% respectively. While Insurance and Industrial Indices declined by 2.34% and 1.09% respectively.

Market activity measured by aggregate volume decreased by 77.99% while value decreased by 73.44%. Investors traded a total of 139 million units of shares valued at 1.71 billion in 3,539 deals.

Market breadth measured by Advancers/Decliners was Positive as it closed at 1.67x indicating a Bullish mood. At the close of trading **UPL (9.80%), TRANSCOHOT (9.70%), OANDO (6.07%), CHAMPION (4.50%), ACCESS (2.79%), NASCON (2.70%), WEMABANK (2.63%), JAIZBANK (1.75%), FCMB (1.35%), DANGSUGAR (1.16%), UACN (1.00%), FLOURMILL (0.86%), HONYFLOUR (0.53%) and WAPCO (0.45%)** were amongst the 20 market gainers **MANSARD (-9.94%), BUACEMENT (-2.94%), TRANSCORP (-1.08%), ETI (-0.94%), UBA (-0.67%), UCAP (-0.58%), GTCO (-0.54%), FIDELITYBK (-0.41%) and ZENITHBANK (-0.21%)** amongst others were the 12 market laggards. 72 stock prices remained unchanged.

Banking emerged as the most active sector. Equities of FIDELITYBK, ACCESS and STERLNBANK were the most active in the subsector as 36 million units of shares worth N256.71 million were traded in 1,646 transactions. FIDELITYBK, ACCESS and STERLNBANK accounted for 67% of the total volume traded in the subsector.

Insurance sector came second ahead of Other Financial Institutions. Equities of SOVRENINS and MBENEFIT were the most active in the subsector as 24 million units of shares worth N8.34 million were traded in 561 transactions. Trading in the Equities of SOVRENINS and MBENEFIT accounted for 87% 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 0.04% to close at 742.38. Consequently, Market Capitalization closed at 645.26 billion. Market activity measured by aggregate volume increased 40,612.03% while value increased by 3,266.85%. Investors traded a total of 1,431,934,770 units of shares valued at N1.82 billion in 30 deals.

NGX Market Indices

| | |
|-----------------------|-----------------------|
| All Share Index | 38,864.33 |
| Previous ASI | 38,962.28 |
| % Day Change | -0.25% |
| % Weekly Change | -0.25% |
| No. of Deals | 3,539 |
| Volume | 139,453,012 |
| Value | 1,712,587,062.93 |
| Market Capitalization | 20,248,582,429,631.44 |
| 1 Month High | 39,261.01 |
| 1 Month Low | 38,852.69 |

NGX Top Five Gainers

| Symbols | Daily ▲ | Price (₦) |
|------------|---------|-----------|
| TRANSCOHOT | 0.48 | 5.43 |
| NASCON | 0.40 | 15.20 |
| OANDO | 0.30 | 5.24 |
| ACCESS | 0.25 | 9.20 |
| CUTIX | 0.25 | 4.90 |

NGX Top Five Losers

| Symbols | Daily ▼ | Price (₦) |
|------------|---------|-----------|
| BUACEMENT | -2.00 | 66.00 |
| MANSARD | -0.33 | 2.99 |
| GTCO | -0.15 | 27.60 |
| ZENITHBANK | -0.05 | 23.45 |
| ETI | -0.05 | 5.25 |

NGX Top Five Trades

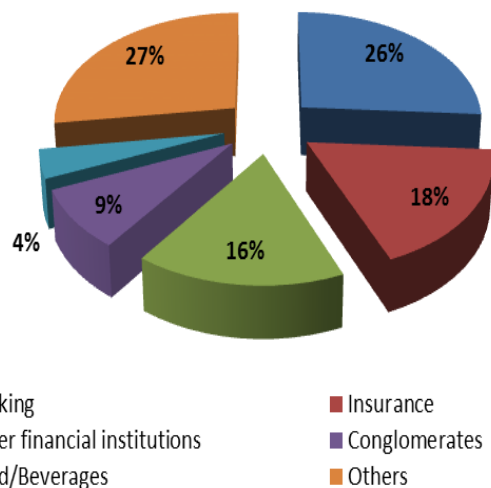
| Symbols | Price (₦) | Volume |
|------------|-----------|------------|
| SOVRENINS | 0.24 | 19,078,615 |
| FIDELITYBK | 2.44 | 11,853,982 |
| GTCO | 27.6 | 11,146,052 |
| TRANSCORP | 0.92 | 10,050,568 |
| COURTVILLE | 0.35 | 7,951,977 |

NASD Market Summary

| Symbols | Price (₦) | Volume |
|------------|-----------|---------------|
| SDFCWAMCO | 120.00 | 26,000 |
| SDFOODCPT | 0.75 | 1,430,831,910 |
| SDNASDPLC | 11.50 | 50,100 |
| SDNGXGROUP | 13.13 | 1,026,510 |
| SDNIPCOPLC | 77.00 | 250 |

Daily Market Report for 270921

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 | 580.00 | 584.00 |
| POUNDS | 762.00 | 770.00 |
| EURO | 647.00 | 655.00 |

GLOBAL MARKET INDICES*

| MARKET | TODAY'S CLOSE | % CHANGE |
|----------------|---------------|----------|
| DJIA | 34,798.00 | 0.10% |
| S&P 500 Index | 4,455.48 | 0.15% |
| FTSE 100 Index | 7,049.99 | -0.02% |
| CAC 40 Index | 6,651.23 | 0.19% |
| NIKKEI 225 | 30,240.06 | -0.03% |
| DAX index | 15,566.06 | 0.22% |

CORPORATE DISCLOSURE

| Company | Dividend/Share | Bonus | Closure of Register | AGM Date | Payment Date |
|------------------|----------------|-------|--|------------------------------|-----------------------------|
| UBA PLC | N0.20 | Nil | 24 th September, 2021 | 9 th April, 2021 | 30 th Sept, 2021 |
| GTCOPLC | N0.30 | Nil | 28 th September, 2021 | 1 st April, 2021 | 12 th Oct, 2021 |
| STANBIC IBTC PLC | N1.00 | Nil | 21 st -28 th September, 2021 | 27 th May, 2021 | 29 th Sept, 2021 |
| ACCESS BANK PLC | N0.30 | Nil | 17 th September, 2021 | 30 th April, 2021 | 29 th Sept, 2021 |
| ZENITH BANK PLC | N0.30 | Nil | 13 th September, 2021 | 16 th March, 2021 | 20 th Sept, 2021 |
| LEARN AFRICA PLC | N2.067 | Nil | 11 th October, 2021 | 21 st Oct, 2021 | 22 nd Oct, 2021 |
| UPL Plc | N0.05 | Nil | 1 st September, 2021 | 23 rd Sept, 2021 | 23 rd Sept, 2021 |
| TRIPPLE G Plc | N0.07 | Nil | 24 th August, 2021 | 15 th Sept, 2021 | 9 th 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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