

Daily Market Report



Tuesday September 28, 2021

Equities market closes on a Flat note... ASI loses 1 Basis Point

The Nigerian Exchange Limited (NGX) closed Flat. The benchmark All Share Index (ASI) depreciated by 0.01% to close at 38,858.99. Market Capitalization decreased by 2.78 Billion to close at N20.245 trillion while the Year-to-Date (YtD) returns settled at -3.51%.

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 (-9.70%), AFRIPRUD (-8.59%), TRIPPLEG (-6.25%), WAPIC (-4.00%), FCMB (-3.33%), ACCESS (-1.09%), AIICO (-1.04%), ZENITHBANK (-0.64%) and UPDC (-0.53%)** 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, Consumer Goods and Insurance Indices declined by 0.30%, 0.03% and 3.39% respectively. While Oil & Gas and Industrial Indices advanced by 0.04% and 0.02% respectively.

Market activity measured by aggregate volume increased by 277.40% while value increased by 77.78%. Investors traded a total of 526 million units of shares valued at 3.04 billion in 3,535 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.93x indicating a Bearish mood. At the close of trading **SKYAVN (9.88%), WEMABANK (5.13%), FLOURMILL (1.87%), UCAP (1.75%), JAIZBANK (1.72%), GTCO (1.47%), TRANSCORP (1.09%), ETI (0.95%), FBNH (0.67%), WAPCO (0.44%), FIDELITYBK (0.41%), HONYFLOUR (0.26%) and OANDO (0.19%)** were amongst the 14 market gainers **MANSARD (-9.70%), AFRIPRUD (-8.59%), TRIPPLEG (-6.25%), WAPIC (-4.00%), FCMB (-3.33%), ACCESS (-1.09%), AIICO (-1.04%), ZENITHBANK (-0.64%) and UPDC (-0.53%)** amongst others were the 15 market laggards. 75 stock prices remained unchanged.

Food/Beverages emerged as the most active sector. Equities of HONYFLOUR, CADBURY and DANGSUGAR were the most active in the subsector as 411 million units of shares worth N2.12 Billion were traded in 748 transactions. HONYFLOUR, CADBURY and DANGSUGAR accounted for 99% of the total volume traded in the subsector.

Banking sector came second ahead of Insurance. Equities of UBA and FIDELITYBK were the most active in the subsector as 45 million units of shares worth N294.27 million were traded in 1,647 transactions. Trading in the Equities of UBA and FIDELITYBK accounted for 45% 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 0.67% to close at 737.39. Consequently, Market Capitalization closed at 640.92 billion. Market activity measured by aggregate volume decreased 99.46% while value decreased by 97.78%. Investors traded a total of 7,796,355 units of shares valued at N40.24 million in 23 deals.

NGX Market Indices

All Share Index	38,858.99
Previous ASI	38,864.33
% Day Change	-0.01%
% Weekly Change	-0.27%
No. of Deals	3,535
Volume	526,300,850
Value	3,044,604,424.42
Market Capitalization	20,245,800,760,000.58
1 Month High	39,261.01
1 Month Low	38,852.69

NGX Top Five Gainers

Symbols	Daily ▲	Price (₦)
FLOURMILL	0.55	29.90
SKYAVN	0.40	4.45
GTCO	0.40	27.70
UCAP	0.15	8.70
WAPCO	0.10	22.60

NGX Top Five Losers

Symbols	Daily ▼	Price (₦)
AFRIPRUD	-0.55	5.85
MANSARD	-0.29	2.70
ZENITHBANK	-0.15	23.30
CUTIX	-0.10	4.80
FCMB	-0.10	2.90

NGX Top Five Trades

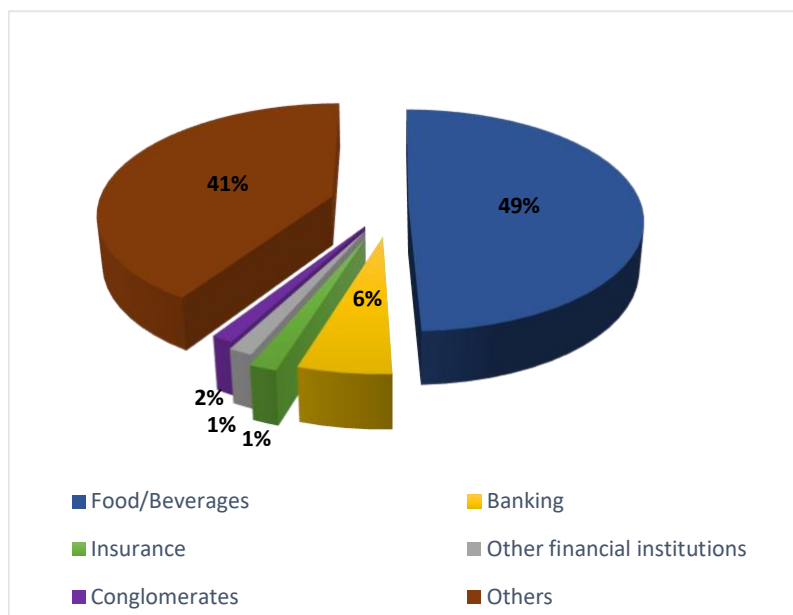
Symbols	Price (₦)	Volume
HONYFLOUR	3.83	402,184,903
UBA	7.45	11,121,677
TRANSCORP	0.93	9,471,634
FIDELITYBK	2.45	9,151,378
WEMABANK	0.82	8,712,409

NASD Market Summary

Symbols	Price (₦)	Volume
SD11PLC	215.00	2,055
SDCSCSPC	16.95	7,500
SDFARMSPLC	1.00	200
SDFCWAMCO	120.00	14,000
SDFOODCPT	0.83	5,000,000
SDNASDPLC	11.65	1,549,900
SDNGXGROUP	13.04	1,215,300

Daily Market Report for 280921

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	574.00	578.00
POUNDS	762.00	770.00
EURO	647.00	655.00
GLOBAL MARKET INDICES*		
MARKET	TODAY'S CLOSE	% CHANGE
DJIA	34,384.55	-1.39%
S&P 500 Index	4,362.89	-1.81%
FTSE 100 Index	7,030.37	-0.47%
CAC 40 Index	6,508.93	-2.13%
NIKKEI 225	30,183.96	-0.19%
DAX index	15,266.43	-1.97%

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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