

# Daily Market Report



Monday March 28, 2022

## NGX All Share Index closes on a Negative note... ASI loses 15 Basis Point

The Nigerian Exchange Limited Bourse closed Negative. The benchmark All Share Index (ASI) depreciated by 0.15% to close at 46,893.86 pts. Market Capitalization decreased by 37.93 billion to close at N25.27 trillion while the Year-to-Date (YtD) returns settled at 9.78%.

### 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. Some of today's market losers include, **LEARNAFRCA (-9.68%), FCMB (-6.89%), TRANSCORP (-6.54%), ARDOVA (-3.35%), HONYFLOUR (-2.81%), ZENITHBANK (-2.28%), FBNH (-2.11%) and FIDELITYBK (-0.61%) 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, Consumer Goods, Insurance and Oil/Gas Indices declined by 4.42%, 1.39%, 0.30% and 0.12% respectively. While Industrial Index advanced 0.06%.

Market activity measured by aggregate volume increased by 103.22% while value decreased by 37.54%. Investors traded a total of 359 million units of shares valued at N2.61 billion in 5,163 deals.

Market breadth measured by Advancers/Decliners was Flat as it closed at 1.00x indicating a Flat mood. At the close of trading, **BETAGLAS (9.92%), PZ (9.68%), JAIZBANK (6.06%), ETI (3.51%), UACN (3.42%), ACCESSCORP (3.02%), NGXGROUP (2.13%), MTNN (1.47%), UBA (0.65%), GTCO (0.43%) and WAPCO (0.21%)** were amongst the 18 market gainers **LEARNAFRCA (-9.68%), FCMB (-6.89%), TRANSCORP (-6.54%), ARDOVA (-3.35%), HONYFLOUR (-2.81%), ZENITHBANK (-2.28%), FBNH (-2.11%) and FIDELITYBK (-0.61%) amongst others** were the 18 market laggards. 71 stock prices remained unchanged.

Banking emerged as the most active sector. Equities of FIDELITYBK, STERLNBANK and ACCESSCORP were the most active in the subsector as 138 million units of shares worth N751.05 million were traded in 1,882 transactions. Trading in the Equities of FIDELITYBK, STERLNBANK and ACCESSCORP accounted for 82% of the total volume traded in the subsector.

Conglomerates sector came second ahead of Insurance. Equities of TRANSCORP and UACN were the most active in the subsector as 104 million units of shares worth N232.96 million were traded in 810 transactions. Trading in the Equities of TRANSCORP and UACN accounted for 98% of the total volume traded in the subsector.

### NASD Market

The NASD market closed Flat after today's trading activities as the Unlisted Securities Index (USI) increased by 0.00% to close at 723.11. Market Capitalization closed at 950.80 billion. Market activity measured by aggregate volume decreased by 34.68% and value decreased by 70.25%. Investors traded a total of 3.45 million units of shares valued at N22.38 million in 8 deals.

## NGX Market Indices

All Share Index	46,893.86
Previous ASI	46,964.23
% Day Change	-0.15%
% Weekly Change	-0.15%
No. of Deals	5,163
Volume	359,890,155
Value	2,611,059,879.50
Market Capitalization	25,273,234,921,711.77
1 Month High	47,482.73
1 Month Low	46,961.62

## NGX Top Five Gainers

Symbols	Daily ▲	Price (₦)
BETAGLAS	5.25	58.20
MTNN	3.00	207.00
PZ	0.90	10.20
NGXGROUP	0.50	24.00
ETI	0.40	11.80

## NGX Top Five Losers

Symbols	Daily ▼	Price (₦)
ZENITHBANK	-0.55	23.55
ARDOVA	-0.40	11.55
FBNH	-0.25	11.60
FCMB	-0.23	3.11
LEARNAFRCA	-0.21	1.96

## NGX Top Five Trades

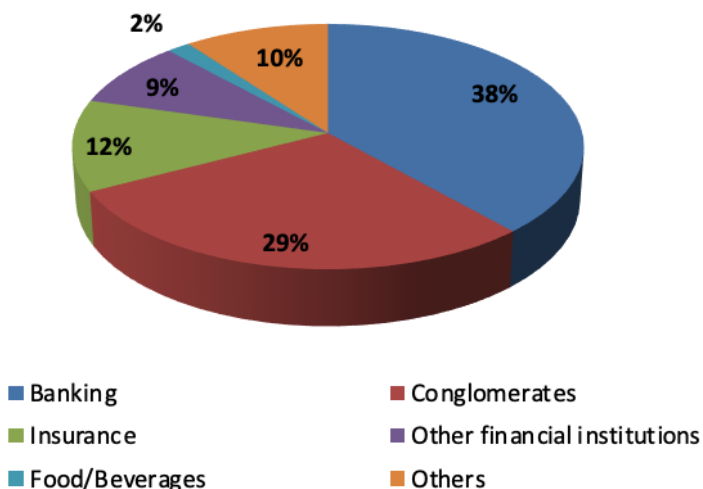
Symbols	Price (₦)	Volume
TRANSCORP	1.00	92,000,946
STERLNBANK	1.51	50,738,578
FIDELITYBK	3.28	46,676,650
LINKASSURE	0.54	30,514,000
ACCESSCORP	10.25	15,457,710

## NASD Market Summary

Symbols	Price (₦)	Volume
SDCSCSPLC	17.00	700
SDFCWAMCO	124.50	2,180
SDIGIPLC	0.08	3,310,000
SDNASDPLC	12.59	18,170
SDNDEP	180.00	120,000

# Daily Market Report for 28032022

## 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	586.00	588.00
POUNDS	777.00	779.00
EURO	630.00	633.00

### GLOBAL MARKET INDICES\*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	34,737.95	-0.35%
S&P 500 Index	4,542.60	-0.01%
FTSE 100 Index	7,489.50	0.08%
DAX index	14,469.74	1.15%
CAC 40 Index	6,607.25	0.82%
NIKKEI 225	27,943.89	-0.73%
CSI 300 Index	4,148.47	-0.63%

## CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
Transcorp Nigeria Plc	N0.02	Nil	11 <sup>th</sup> April, 2022	21 <sup>st</sup> April, 2022	22 <sup>nd</sup> April, 2022
Fidson Healthcare Plc	N0.50	Nil	TBA	TBA	TBA
Access Bank Plc	N0.70	Nil	20 <sup>th</sup> April, 2022	28 <sup>th</sup> March, 2022	28 <sup>th</sup> April, 2022
GT Holding Company Plc	N2.70	Nil	24 <sup>th</sup> March, 2022	8 <sup>th</sup> April, 2022	8 <sup>th</sup> April, 2022
United Bank for Africa Plc	N0.80	Nil	21 <sup>st</sup> March, 2022	7 <sup>th</sup> April, 2022	7 <sup>th</sup> April, 2022
Dangote Sugar Refinery Plc	N1.00	Nil	2 <sup>nd</sup> June, 2022	15 <sup>th</sup> June, 2022	16 <sup>th</sup> June, 2022
Nascon Allied Industries Plc	N0.40	Nil	6 <sup>th</sup> May, 2022	3 <sup>rd</sup> June, 2022	6 <sup>th</sup> June, 2022
Nestle Nigeria Plc	N25.50	Nil	30 <sup>th</sup> May, 2022	29 <sup>th</sup> June, 2022	30 <sup>th</sup> June, 2022
Lafarge Africa Plc	N1.00	Nil	4 <sup>th</sup> April, 2022	21 <sup>st</sup> April, 2022	21 <sup>st</sup> April, 2022
Dangote Cement Plc	N20.00	Nil	31 <sup>st</sup> May, 2022	14 <sup>th</sup> June 2022	15 <sup>th</sup> June, 2022
Transcorp Hotels Plc	N0.07	Nil	24 <sup>th</sup> March, 2022	4 <sup>th</sup> April, 2022	5 <sup>th</sup> April, 2022
Zenith Bank Plc	N2.80	Nil	28 <sup>th</sup> March, 2022	6 <sup>th</sup> April, 2022	6 <sup>th</sup> April, 2022
Seplat Energy Plc	\$0.025	Nil	6 <sup>th</sup> May, 2022	18 <sup>th</sup> May, 2022	25 <sup>th</sup> May, 2022
Nigerian Breweries Plc	N1.20	Nil	10 <sup>th</sup> March, 2022	22 <sup>nd</sup> April, 2022	22 <sup>nd</sup> April, 2022
MTN Nigeria Plc	N8.57	Nil	7 <sup>th</sup> April, 2022	28 <sup>th</sup> April, 2022	28 <sup>th</sup> April, 2022

\*TBA – To Be Announced

**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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