

# Daily Market Report



Monday July 25, 2022

## NGX All Share Index closes on a Negative note... ASI loses 111 Basis Points

The Nigerian Exchange Limited Bourse closed Negative. The benchmark All Share Index (ASI) depreciated by 1.11% to close at 51,400.53 pts. Market Capitalization decreased by 312.44 billion to close at N27.72 trillion and the Year-to-Date (YtD) returns settled at 20.33%.

### 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, Oil/Gas and Industrial. Some of today's market losers include, **MTNN (-6.99%), UCAP (-5.51%), TRANSCORP (-3.36%), UBA (-2.74%), FBNH (-1.79%), ACCESSCORP (-1.10%), ETI (-1.00%), GTCO (-0.24%) and OANDO (-0.19%) amongst others.**

### Sectors performance was Broadly Bullish.

Performance across sectors was broadly bullish as 4 out of 5 sectors closed in the green zone. Banking, Consumer Goods, Industrial and Insurance Indices advanced by 1.03%, 0.12%, 0.04% and 0.06% respectively. While Oil/Gas Index declined by 0.03%.

Market activity measured by aggregate volume decreased by 51.79% and value decreased by 17.77%. Investors traded a total of 99 million units of shares valued at N2.51 billion in 4,314 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.76x indicating a Bearish mood. At the close of trading, **FTNCOCOA (10.00%), NAHCO (10.00%), CAP (10.00%), ZENITHBANK (4.58%), FCMB (2.65%) and WAPCO (0.41%)** were amongst the 13 market gainers **MTNN (-6.99%), UCAP (-5.51%), TRANSCORP (-3.36%), UBA (-2.74%), FBNH (-1.79%), ACCESSCORP (-1.10%), ETI (-1.00%), GTCO (-0.24%) and OANDO (-0.19%) amongst others** were the 17 market laggards. 75 stock prices remained unchanged.

Banking emerged as the most active sector. Equities of UBA, ZENITHBANK and FIDELITYBK were the most active in the subsector as 36 million units of shares worth N408.4 million were traded in 844 transactions. Trading in the Equities of UBA, FIDELITYBK and ZENITHBANK accounted for 87% of the total volume traded in the subsector.

Other Financial Institutions sector came second ahead of Insurance. Equities of FBNH and GTCO were the most active in the subsector as 18 million units of shares worth N233.04 million were traded in 910 transactions. Trading in the Equities of FBNH and GTCO accounted for 47% 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) declined by 0.00% to close at 766.92 pts. Consequently, Market Capitalization closed at 1.01 trillion. Market activity measured by aggregate volume decreased by 89.93% and value decreased by 88.49%. Investors traded a total of 306,929 units of shares valued at N5.25 million in 7 deals.

## NGX Market Indices

All Share Index	51,400.53
Previous ASI	51,979.92
% Day Change	-1.11%
% Weekly Change	-1.11%
No. of Deals	4,314
Volume	98,852,029
Value	2,514,701,035.99
Market Capitalization	27,718,228,076,348.12
1 Month High	52,319.94
1 Month Low	51,339.01

## NGX Top Five Gainers (By Price)

Symbols	Daily ▲	Price (₦)
CAP	1.70	18.70
ZENITHBANK	0.95	21.70
NAHCO	0.55	6.05
MULTIVERSE	0.15	2.05
INTBREW	0.15	5.55

## NGX Top Five Losers (By Price)

Symbols	Daily ▼	Price (₦)
MTNN	-16.00	213.00
UCAP	-0.70	12.00
UBA	-0.20	7.10
FBNH	-0.20	11.00
CUTIX	-0.13	2.25

## NGX Top Five Trades (By Volume)

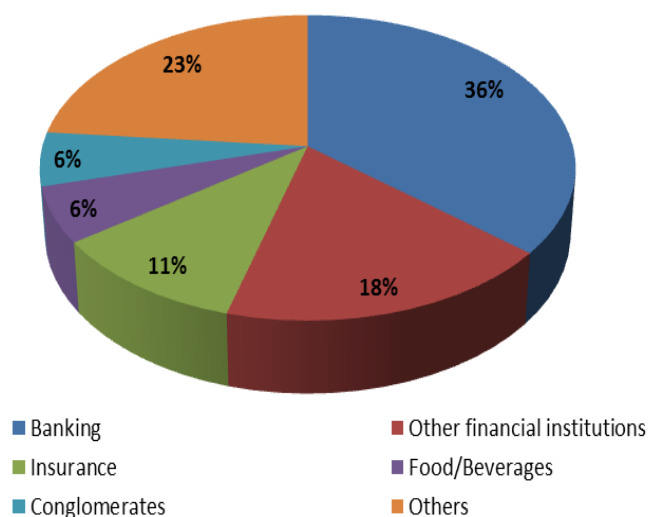
Symbols	Price (₦)	Volume
UBA	7.10	15,850,592
ZENITHBANK	21.70	12,269,607
TRANSCORP	1.15	5,433,024
GTCO	20.70	5,096,829
DANGSUGAR	16.00	4,176,728

## NASD Market Summary

Symbols	Price (₦)	Volume
SDCSCSPLC	14.92	300,000
SDFCWAMCO	94.14	6,200
SDNDEP	210.00	729

# Daily Market Report for 25072022

## 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	645.00	646.00
POUNDS	761.00	763.00
EURO	648.00	650.00

### GLOBAL MARKET INDICES\*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	31,939.94	0.13%
S&P 500 Index	3,965.39	0.09%
FTSE 100 Index	7,295.49	0.26%
DAX index	13,185.74	-0.51%
CAC 40 Index	6,225.98	0.15%
NIKKEI 225	27,699.25	-0.77%
CSI 300 Index	4,212.64	-0.60%

## CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
NNFM Plc	N0.25	NIL	24 <sup>th</sup> August, 2022	8 <sup>th</sup> September, 2022	9 <sup>th</sup> September, 2022
Flour Mills of Nigeria Plc	N2.15	NIL	15 <sup>th</sup> August, 2022	7 <sup>th</sup> September, 2022	8 <sup>th</sup> September, 2022
Presco Plc	N6.60	NIL	11 <sup>th</sup> July, 2022	TBA	28 <sup>th</sup> July, 2022
Airtel Africa Plc	\$0.30 cents	NIL	23 <sup>rd</sup> June, 2022	N/A	22 <sup>nd</sup> July, 2022
NAHCO Plc	N0.41	1 for 5	18 <sup>th</sup> July, 2022	29 <sup>th</sup> July 2022	29 <sup>th</sup> July, 2022
Fidson Healthcareb Plc	N0.50	NIL	11 <sup>th</sup> July, 2022	28 <sup>th</sup> July, 2022	29 <sup>th</sup> July, 2022
BUA Cement Plc	N2.60	NIL	11 <sup>th</sup> July, 2022	21 <sup>st</sup> July, 2022	21 <sup>st</sup> July, 2022

**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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