

Daily Market Report



Monday September 19, 2022

NGX All Share Index closes on a Negative note... ASI Loses 7 Basis Points

The Nigerian Exchange Limited Bourse closed Negative. The benchmark All Share Index (ASI) depreciated by 0.07% to close at 49,440.21 pts. Market Capitalization decreased by 18.99 billion to close at N26.67 trillion and the Year-to-Date (YtD) returns settled at 15.74%.

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, **ABCTRANS (-10.00%)**, **MBENEFIT (-6.90%)**, **COURTVILLE (-6.12%)**, **SEPLAT (-3.85%)**, **MANSARD (-2.86%)**, **JAIZBANK (-1.19%)**, **UCAP (-0.42%)** and **GTCO (-0.25%)** amongst others.

Sectors performance was Broadly Bearish.

Performance across sectors was broadly bearish as 2 out of 5 sectors closed in the red zone. Insurance and Oil/Gas Indices declined by 0.25% and 1.94% respectively. Banking and Consumer Goods indices advanced by 0.28% and 0.17%. While Industrial index remained unchanged.

Market activity measured by aggregate volume decreased by 37.33% while value increased by 28.70%. Investors traded a total of 67 million units of shares valued at N1.48 billion in 3,386 deals.

Market breadth measured by Advancers/Decliners was Flat as it closed at 1.00x indicating a Flat mood. At the close of trading **ETRANZACT (9.97%)**, **ACADEMY (9.52%)**, **VITAFOAM (5.00%)**, **HONYFLOUR (3.36%)**, **INTBREW (3.13%)**, **UBA (2.11%)**, **AICO (1.85%)** and **MULTIVERSE (1.79%)** were amongst the 11 market gainers **ABCTRANS (-10.00%)**, **MBENEFIT (-6.90%)**, **COURTVILLE (-6.12%)**, **SEPLAT (-3.85%)**, **MANSARD (-2.86%)**, **JAIZBANK (-1.19%)**, **UCAP (-0.42%)** and **GTCO (-0.25%)** were amongst others were the 11 market laggards. 83 stock prices remained unchanged.

Other Financial Institutions emerged as the most active sector. Equities of FBNH, GTCO and UCAP were the most active in the subsector as 20 million units of shares worth N258.02 million were traded in 1,479 transactions. Trading in the Equities of FBNH, GTCO and UCAP accounted for 86% of the total volume traded in the subsector.

Banking sector came second ahead of the Insurance sector. Equities of ZENITHBANK and STERLNBANK were the most active in the subsector as 16 million units of shares worth N211.87 million were traded in 1,318 transactions. Trading in the Equities of ZENITHBANK and STERLNBANK accounted for 75% of the total volume traded in the subsector.

NASD Market

The NASD market closed Positive after today's trading activities as the NASD Security Index (NSI) advanced by 0.08% to close at 741.70 pts. Consequently, Market Capitalization closed at 976.39 billion. Market activity measured by aggregate volume increased by 148.80% and value increased by 8,359.95%. Investors traded a total of 25 million units of shares valued at N135.20 million in 11 deals.

NGX Market Indices

All Share Index	49,440.21
Previous ASI	49,475.42
% Day Change	-0.07%
% Weekly Change	-0.07%
No. of Deals	3,386
Volume	67,369,216
Value	1,480,244,462.92
Market Capitalization	26,667,158,851,006.4
1 Month High	50,045.83
1 Month Low	48,554.76

NGX Top Five Gainers (By Price)

Symbols	Daily ▲	Price (₦)
VITAFOAM	1.00	21.00
ETRANZACT	0.29	3.20
ACADEMY	0.16	1.84
UBA	0.15	7.25
INTBREW	0.15	4.95

NGX Top Five Losers (By Price)

Symbols	Daily ▼	Price (₦)
SEPLAT	-50.00	1,250.00
UPL	-0.17	1.63
GTCO	-0.05	19.65
MANSARD	-0.05	1.70
UCAP	-0.05	11.90

NGX Top Five Trades (By Volume)

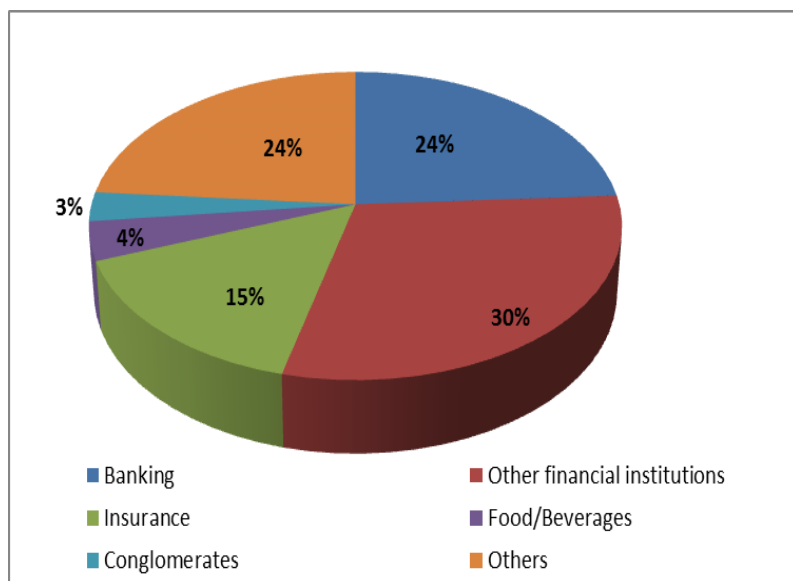
Symbols	Price (₦)	Volume
FBNH	10.00	9,672,684
ZENITHBANK	19.75	9,252,081
GTCO	19.65	6,112,768
MBENEFIT	0.27	4,487,018
SOVRENINS	0.27	2,954,550

NASD Market Summary

Symbols	Price (₦)	Volume
SD11PLC	180.00	1,431
SDCSCSPLC	13.50	810
SDFCWAMCO	81.05	12,500
SDNASDPLC	13.75	5,000
SDNDEP	195.00	15,000
SDNMRCPLC	5.24	24,995,000

Daily Market Report for 19092022

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	712.00	714.00
POUNDS	855.00	858.00
EURO	705.00	707.00

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	30,903.49	0.26%
S&P 500 Index	3,862.83	-0.27%
FTSE 100 Index	7,236.68	-0.62%
DAX index	12,759.37	0.14%
CAC 40 Index	6,052.04	-0.42%
NIKKEI 225	27,567.65	-1.11%
CSI 300 Index	3,928.00	-0.12%

CORPORATE DISCLOSURE

Company	Dividend/Share	Bonus	Closure of Register	AGM Date	Payment Date
Access Holdings Plc	N0.20	NIL	29 th September, 2022	N/A	12 th October, 2022
United Bank for Africa Plc	N0.20	NIL	23 rd September, 2022	N/A	29 th September, 2022
Guaranty Trust Holding Plc	N0.30	NIL	21 st September, 2022	N/A	30 th September, 2022
Fidelity Bank Plc	N0.10	NIL	13 th September, 2022	N/A	20 th September, 2022
Stanbic IBTC Holdings Plc	N1.50	NIL	7 th September, 2022	N/A	21 st September, 2022
Zenith Bank Plc	N0.30	NIL	7 th September, 2022	N/A	13 th September, 2022
Learn Africa PLC	N0.20	NIL	12 th September, 2022	29 th September, 2022	30 th September, 2022
Guinness Nigeria Plc	N7.14	NIL	26 th September, 2022	25 th October, 2022	26 th October, 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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