

Daily Market Report



Tuesday September 27, 2022

NGX All Share Index closes on a Negative note... ASI Loses 12 Basis Points

The Nigerian Exchange Limited Bourse closed negative. The benchmark All Share Index (ASI) depreciated by 0.12% to close at 49,161.45. Market Capitalization decreased by 30.70 billion to close at N26.52 trillion and the Year-to-Date (YtD) returns settled at 15.09%.

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, **MAYBAKER (-9.79%)**, **VITAFOAM (-6.98%)**, **UNILEVER (-5.38%)**, **ACCESSCORP (-4.55%)**, **UBA (-1.39%)**, **FBNH (-0.99%)**, **STERLN BANK (-0.66%)** and **GTCO (-0.53%)** amongst others.

Sectors performance was Broadly Bearish.

Performance across sectors was broadly bearish as 2 out of 5 sectors closed in the red zone. Banking, Consumer Goods Indices declined by 0.65% and 0.06% respectively. Insurance and Oil/Gas indices advanced by 0.06% and 0.20% respectively. While Industrial index remained flat.

Market activity measured by aggregate volume increased by 74.53% and value increased by 183.43%. Investors traded a total of 206 million units of shares valued at N2.36 billion in 3,777 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.82x indicating a Bearish mood. At the close of trading **MULTIVERSE (10.00%)**, **NGXGROUP (10.00%)**, **COURTVILLE (8.89%)**, **CHAMPION (8.53%)**, **CADBURY (7.17%)**, **UCAP (2.62%)** and **ZENITHBANK (1.00%)** were amongst the 14 market gainers **MAYBAKER (-9.79%)**, **VITAFOAM (-6.98%)**, **UNILEVER (-5.38%)**, **ACCESSCORP (-4.55%)**, **UBA (-1.39%)**, **FBNH (-0.99%)**, **STERLN BANK (-0.66%)** and **GTCO (-0.53%)** were amongst others were the 17 market laggards. 78 stock prices remained unchanged.

Banking sector emerged as the most active sector. Equities of ZENITHBANK, UBA and FIDELITYBK were the most active in the subsector as 48 million units of shares worth N774.79 million were traded in 1,143 transactions. Trading in the Equities of ZENITHBANK, UBA and FIDELITYBK accounted for 94% of the total volume traded in the subsector.

Other Financial institutions came second ahead of the Conglomerates sector. Equities of FCMB and GTCO were the most active in the subsector as 43 million units of shares worth N269.56million were traded in 1,705 transactions. Trading in the Equities of FCMB and GTCO accounted for 77% 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 0.98 % to close at 732.25pts. Consequently, Market Capitalization closed at 963.94billion. Market activity measured by aggregate volume decreased by 409% and value increased by 129.1%. Investors traded a total of 189,296 units of shares valued at N6.23million in 18 deals.

NGX Market Indices

All Share Index	49,161.45
Previous ASI	49,218.35
% Day Change	-0.12%
% Weekly Change	0.28%
No. of Deals	3,777
Volume	206,206,729
Value	2,362,405,322.42
Market Capitalization	26,517,266,285,245.70
1 Month High	50,045.83
1 Month Low	49,026.62

NGX Top Five Gainers (By Price)

Symbols	Daily ▲	Price (₦)
NGXGROUP	1.80	19.80
CADBURY	0.85	12.70
ETERNA	0.57	6.32
MULTIVERSE	0.31	3.41
UCAP	0.30	11.75

NGX Top Five Losers (By Price)

Symbols	Daily ▼	Price (₦)
VITAFOAM	-1.50	20.00
UNILEVER	-0.70	12.30
ACCESSCORP	-0.40	8.40
MAYBAKER	-0.38	3.50
GLAXOSMITH	-0.30	5.60

NGX Top Five Trades (By Volume)

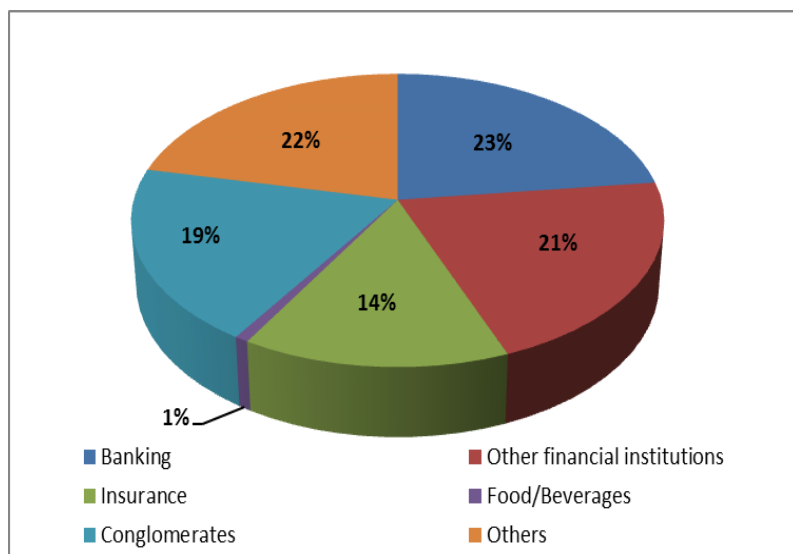
Symbols	Price (₦)	Volume
TRANSCORP	1.04	38,462,277
ZENITHBANK	20.20	35,273,904
FCMB	3.50	30,185,296
VITAFOAM	20.00	18,129,978
LINKASSURE	0.47	8,889,993

NASD Market Summary

Symbols	Price (₦)	Volume
SD11PLC	170.00	2,055
SDAFRILAND	1.22	2,500
SDCSCSPLC	12.90	750
SDFCWAMCO	78.00	20,543
SDNASDPLC	13.00	152,500
SDNDEP	198.00	10,948

Daily Market Report for 27092022

TOP SIX SUBSECTORS BY VOLUME TRADES



CBN OFFICIAL RATES AS AT TODAY

CURRENCY	BID	OFFER
US DOLLAR	436.00	437.00
POUNDS	563.00	564.00
EURO	483.00	484.00

AUTONOMOUS MARKET (CASH)

US DOLLAR	721.00	724.00
POUNDS	873.00	876.00
EURO	704.00	707.00

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	29,613.15	0.08%
S&P 500 Index	3,704.68	0.31%
FTSE 100 Index	7,038.89	0.29%
DAX index	12,352.59	0.56%
CAC 40 Index	5,813.20	0.52%
NIKKEI 225	26,431.55	-2.66%
CSI 300 Index	3,836.68	-0.50%

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.

MBC Securities Limited

11th Floor, St. Nicholas House,
5/6, Catholic Mission Street,
Lagos Island, Lagos
Nigeria
+234 1 270800324

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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

MBC Securities Limited

11th Floor, St. Nicholas House,
5/6, Catholic Mission Street,
Lagos Island, Lagos
Nigeria

+234 1 270800324

www.mbcgroup.com.ng

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