

Daily Market Report



Thursday October 27, 2022

NGX All Share Index closes on a Negative note... ASI Loses 52 Basis Points

The Nigerian Exchange Limited Bourse closed Negative. The benchmark All Share Index (ASI) depreciated by 0.52% to close at 44,625.18. The Year-to-Date (YtD) returns settled at 4.47%.

What shaped today's market direction?

Today's market direction can be largely attributed to losses recorded in large and mid-cap stocks in Industrial, Insurance and Oil/Gas. Some of today's market losers include **PHARMDEKO (-9.76%)**, **LINKASSURE (-9.30%)**, **WAPIC (-8.33%)**, **AIICO (-3.45%)**, **AIRTELAFRI (-2.83%)**, **GEREGU (-1.72%)**, **GTCO (-1.10%)** and **AFRIPRUD (-0.96%)** amongst others.

Sectors performance was Flat.

Performance across sectors was Flat as 2 out of 5 sectors closed Positive. Banking, and Consumer Goods indices advanced by 1.11% and 0.01% respectively. Insurance Index declined by 0.98%. While Industrial and Oil/Gas indices remained unchanged.

Market activity measured by aggregate volume increased by 61.34% and value decreased by 54.07%. Investors traded a total of 150 million units of shares valued at N1.55billion in 2,905 deals.

Market breadth measured by Advancers/Decliners was Positive as it closed at 1.33x indicating a Bullish mood. At the close of trading **REGALINS (8.70%)**, **SOVRENINS (8.00%)**, **UACN (4.07%)**, **ZENITHBANK (2.55%)**, **FCMB (1.84%)**, **UBA (1.42%)**, **STERLNBANK (0.67%)**, **NB (0.12%)** and **MTNN (0.05%)** amongst others were the 12 market gainers **PHARMDEKO (-9.76%)**, **LINKASSURE (-9.30%)**, **WAPIC (-8.33%)**, **AIICO (-3.45%)**, **AIRTELAFRI (-2.83%)**, **GEREGU (-1.72%)**, **GTCO (-1.10%)** and **AFRIPRUD (-0.96%)** amongst others were the 9 market laggards. 81 stock prices remained unchanged.

Insurance sector emerged as the most active sector. Equities of MBENEFIT, AIICO and SOVRENINS were the most active in the subsector as 62 million units of shares worth N22.84 million were traded in 420 transactions. Trading in the Equities of MBENEFIT, AIICO and SOVRENINS accounted for 90% of the total volume traded in the subsector.

Banking sector came second ahead of the Other Financial Institutions sector. Equities of FIDELITYBK and ZENITHBANK were the most active in the subsector as 24 million units of shares worth N192 million were traded in 1,220 transactions. Trading in the Equities of FIDELITYBK and ZENITHBANK accounted for 57% of the total volume traded in the subsector.

NASD Market

The NASD market closed Flat after today's trading activities as the NASD Security Index (NSI) remained unchanged to close at 722.54. Consequently, Market Capitalization closed at 951.16 billion. Market activity measured by aggregate volume increased by 71.07% and value increased by 79.63%. Investors traded a total of 196,500 units of shares valued at N13.67million in 6 deals.

NGX Market Indices

All Share Index	44,625.18
Previous ASI	44,859.78
% Day Change	-0.52%
% Weekly Change	0.51%
No. of Deals	2,905
Volume	150,972,195
Value	1,554,103,432.99
1 Month High	49,218.35
1 Month Low	44,318.15

NGX Top Five Gainers (By Price)

Symbols	Daily ▲	Price (₦)
ZENITHBANK	0.50	20.10
UACN	0.35	8.95
UBA	0.10	7.15
MTNN	0.10	197.10
FCMB	0.06	3.32

NGX Top Five Losers (By Price)

Symbols	Daily ▼	Price (₦)
AIRTELAFRI	-37.20	1275.00
GEREGU	-2.00	114.00
PHARMDEKO	-0.20	1.85
GTCO	-0.20	18.00
AFRIPRUD	-0.05	5.15

NGX Top Five Trades (By Volume)

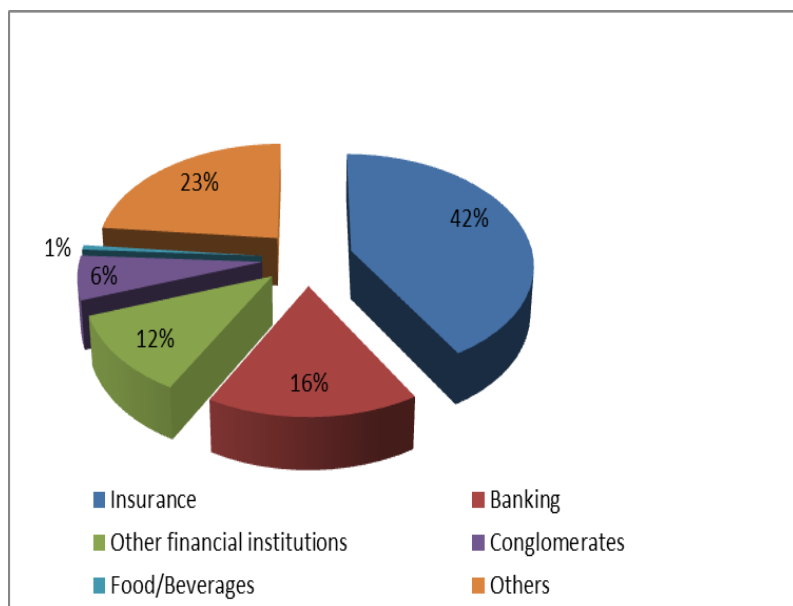
Symbols	Price (₦)	Volume
MBENEFIT	0.29	47,845,747
PHARMDEKO	1.85	22,636,950
TRANSCORP	1.07	8,978,350
FIDELITYBK	3.80	7,858,629
ACCESSCORP	7.70	7,004,206

NASD Market Summary

Symbols	Price (₦)	Volume
SDFCWAMCO	70.00	195,000
SDNEWREST	11.00	1,500

Daily Market Report for 27102022

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	743.00	745.00
POUNDS	838.00	843.00
EURO	710.00	715.00

GLOBAL MARKET INDICES*

MARKET	TODAY'S CLOSE	% CHANGE
DJIA	32,226.97	1.22%
S&P 500 Index	3,816.65	-0.36%
FTSE 100 Index	7,054.67	-0.02%
DAX index	13,149.34	-0.35%
CAC 40 Index	6,230.21	-0.73%
NIKKEI 225	27,345.24	-0.32%
CSI 300 Index	3,631.14	-0.70%

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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