

Daily Market Report



Friday October 28, 2022

NGX All Share Index closes on a Negative note... ASI Loses 160 Basis Points

The Nigerian Exchange Limited Bourse closed Negative. The benchmark All Share Index (ASI) depreciated by 1.60% to close at 43,912.64. The Year-to-Date (YtD) returns settled at 2.80%.

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 Insurance. Some of today's market losers include **DANGCEM (-10.00%)**, **LEARNAFRCA (-9.68%)**, **HONYFLOUR (-9.36%)**, **UBN (-4.72%)**, **STERLNBANK (-3.31%)**, **TRANSCORP (-1.87%)**, **UCAP (-1.65%)**, **NAHCO (-0.96%)**, **ETI (-0.90%)**, **UBA (-0.70%)**, **GTCO (-0.56%)** and **MTNN (-0.05%)** amongst others.

Sectors performance was Negative.

Performance across sectors was Negative as 3 out of 5 sectors closed Negative. Banking, Industrial and Insurance indices declined by 0.22%, 4.83% and 0.45% respectively. Consumer Goods Index advanced by 0.40%. While Oil/Gas Index remained unchanged.

Market activity measured by aggregate volume decreased by 18.67% and value increased by 183.07%. Investors traded a total of 122 million units of shares valued at N4.40 billion in 3,304 deals.

Market breadth measured by Advancers/Decliners was Negative as it closed at 0.88x indicating a Bearish mood. At the close of trading **WAPIC (9.09%)**, **NEIMETH (8.70%)**, **FIDELITYBK (7.89%)**, **FBNH (7.69%)**, **PZ (3.95%)**, **UNILEVER (2.38%)**, **CAVERTON (2.11%)** and **GEREGU (0.88%)** amongst others were the 16 market gainers **DANGCEM (-10.00%)**, **LEARNAFRCA (-9.68%)**, **HONYFLOUR (-9.36%)**, **UBN (-4.72%)**, **STERLNBANK (-3.31%)**, **TRANSCORP (-1.87%)**, **UCAP (-1.65%)**, **NAHCO (-0.96%)**, **ETI (-0.90%)**, **UBA (-0.70%)**, **GTCO (-0.56%)** and **MTNN (-0.05%)** amongst others were the 18 market laggards. 74 stock prices remained unchanged.

Banking sector emerged as the most active sector. Equities of **FIDELITYBK**, **ETI** and **ZENITHBANK** were the most active in the subsector as 40 million units of shares worth N345.40 million were traded in 1,255 transactions. Trading in the Equities of **FIDELITYBK**, **ETI** and **ZENITHBANK** accounted for 82% of the total volume traded in the subsector.

Other Financial Institutions sector came second ahead of the Conglomerates sector. Equities of **FBNH** and **GTCO** were the most active in the subsector as 17 million units of shares worth N204 million were traded in 1,685 transactions. Trading in the Equities of **FBNH** and **GTCO** accounted for 68% of the total volume traded in the subsector.

NASD Market

The NASD market closed Negative after today's trading activities as the NASD Security Index (NSI) declined by 0.05% to close at 722.16. Consequently, Market Capitalization closed at 950.66 billion. Market activity measured by aggregate volume decreased by 94.98% and value decreased by 97.68%. Investors traded a total of 9,856 units of shares valued at N317,428 in 4 deals.

NGX Market Indices

All Share Index	43,912.64
Previous ASI	44,625.18
% Day Change	-1.60%
% Weekly Change	-1.09%
No. of Deals	3,304
Volume	122,785,971
Value	4,399,271,296.01
1 Month High	49,171.70
1 Month Low	43,912.64

NGX Top Five Gainers (By Price)

Symbols	Daily ▲	Price (₦)
GEREGU	1.00	115.00
DANGSUGAR	0.95	16.30
FBNH	0.70	9.80
GLAXOSMITH	0.35	5.75
PZ	0.35	9.20

NGX Top Five Losers (By Price)

Symbols	Daily ▼	Price (₦)
DANGCEM	-24.50	220.50
UBN	-0.30	6.05
NEM	-0.25	3.75
HONYFLOUR	-0.22	2.13
UCAP	-0.20	11.95

NGX Top Five Trades (By Volume)

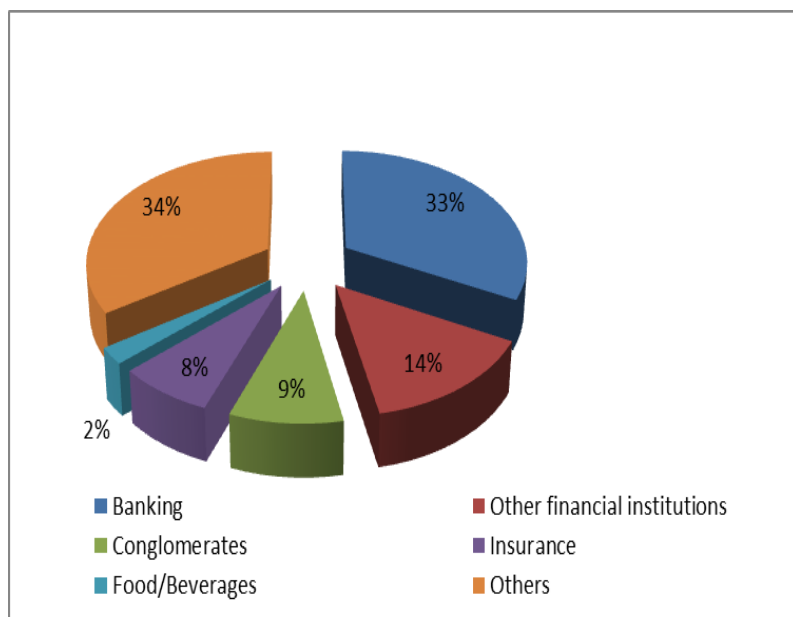
Symbols	Price (₦)	Volume
FIDELITYBK	4.10	14,954,017
ETI	11.00	10,430,335
TRANSCORP	1.05	9,136,792
MTNN	197.00	9,116,325
JAPAUFGOLD	0.31	7,952,185

NASD Market Summary

Symbols	Price (₦)	Volume
SD11PLC	170.00	120
SDCSCSPLC	13.90	7,000
SDFCWAMCO	70.00	2,736

Daily Market Report for 28102022

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	32,428.99	1.24%
S&P 500 Index	3,840.26	0.87%
FTSE 100 Index	7,042.78	-0.44%
DAX index	13,209.85	-0.01%
CAC 40 Index	6,262.87	0.30%
NIKKEI 225	27,105.20	-0.88%
CSI 300 Index	3,541.33	-2.47%

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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