

SUMMARY OF ACTIVITIES ON THE NIGERIAN STOCK EXCHANGE FOR THE WEEK ENDED 28/5/2021

Report Date

Monday, May 31, 2021

The Nigerian bourse ASI retreated the previous week by 0.18 percent to see the benchmark index close at 38,256.99 points.

The Nigerian Exchange Group end the previous trading week on a positive note breaking a losing streak on the bourse. A total turnover of 1.037 billion shares worth N9.471 billion in 17,577 deals were traded this week by investors on the floor of the Exchange, in contrast to a total of 1.048 billion shares valued at N11.543 billion that exchanged hands last week in 17,233 deals. The top trading equities include Zenith Bank, Guaranty Trust Bank, Fidelity Bank (measured by volume) accounted for 229.453 million shares worth N4.281 billion in 3,634 deals, contributing 22.12% and 45.20% to the total equity turnover volume and value respectively. The NSE All-Share Index and Market Capitalization depreciated by 0.18% to close the week at 38,256.95 and N19.940 trillion respectively, while there were Thirty-two (32) equities appreciated in price during the week, higher than Twenty-six (26) in the previous week. Thirty (30) equities depreciated in price lower than Forty-one (41) equities in the previous week, while ninety-eight (98) equities remained unchanged higher than ninety three (93) equities recorded in the previous week.

Key Market Indicators		Week Close 28/05	Week Close 21/05	% Change
The All-Share Index retreated 0.18%	Index	38,256.99	38,324.07	↓ -0.18%
Total Market Cap. depreciated by 0.15%	Market Cap. (N'trn)	19.94	19.97	↓ -0.15%
Total Volume Traded decreased by 0.95%	Trade Volume (mn)	1,037.53	1,047.53	↓ -0.95%
Total Value Traded decreased by 20.64%	Trade Value (N' mn)	9,470.90	11,934.52	↓ -20.64%
Total Number of Deals increased by 2.00%	No. of Deals	17,577	17,233	↑ 2.00%

Best Performers		Open (NGN)	Close (NGN)	% Gain
REGENCY ASSUR		0.34	0.49	44.12%
HALLMARK INSUR		0.51	0.73	43.14%
ROYALEX		0.62	0.81	30.65%
C & I LEASING		4.06	4.84	19.21%
VITAFOAM NIG		9.00	10.10	12.22%

Worst Performers		Open (NGN)	Close (NGN)	% Decline
ASSOCIATED BUS		0.41	0.34	17.07%
ACADEMY		0.39	0.33	15.38%
ENAMELWARE		17.95	16.20	9.75%
FTN COCOA		0.42	0.38	9.52%
AIICO		1.27	1.16	8.66%

Bonds		Deals	Volume (Units)	Value
FGSUK2027S3		14	28,040	29,671,084
FG9B2022S1		3	5,254	5,068,746
FGSUK2025S2		3	4,200	4,823,992
FGS202143		2	2,525	2,560,119
FGSUK2024S1		2	1,619	1,827,221

Retrun Profile							
NSE ASI Return Profile 28/05/2021		Sectoral Indices		WTD	QTD	YTD	
Day change	↑	0.56%	NSE30	↓	-0.34%	↓	-5.35%
WKTD	↓	-0.18%	NSE-CG	↓	-0.07%	↑	-1.79%
MTD	↓	-3.96%	NSE-BNK	↓	-1.80%	↓	-9.60%
QTD	↓	-2.02%	NSE-INS	↑	1.01%	↑	8.41%
YTD	↓	-5.00%	NSE-OILG	↑	0.85%	↑	36.69%
52 Weeks High		42,412.66	NSE-IND	↓	-0.43%	↓	-9.41%
52 Weeks Low		22,470.79					

Economic Snapshot		Till Bills		Yield	Change	
I & E Window	\$	411.00	90 days	4.64	→	0.00%
NAFEX	\$	410.92	181 days	5.9	→	0.00%
Parallel	\$	495.00	364 days	7.5	→	0.00%
Inflation		18.12%	Bonds	Yield	Change	
GDP Rate		0.50%	5yrs	12.43	↓	-0.17%
Brent Crude (Per barrel)	\$	69.32	7yrs	13.1	↓	-0.01%
MPR		11.50%	10yrs	13.12	→	0.00%

OUTLOOK FOR THE WEEK

Meanwhile, with the second dosage of the Covid-19 vaccinations now on the way and more doses of the vaccine are being acquired there is a positive outlook to improved economic activities despite a fragile growth of 0.50 percent in GDP recorded in 2021 Q1 according to the latest figure released by the government. This might however, translate to increase investor confidence in the market, investors should diversify their portfolio to include both short/medium term and long term equities. Investors should consider sectors with high upside potentials on the strength of good earnings and fundamentals.

GLOBAL MARKETS

STOCK MARKET		OPEN	CLOSE	W/W % CHANGE	
US	DJIA	34,207.84	34,529.45	▲	0.94%
	S&P 500	4,155.85	4,204.11	▲	1.16%
	NASDAQ	13,470.99	13,748.73	▲	2.06%
EUROPE	France: CAC 40	6,384.40	6,484.11	▲	1.56%
	Germany: DAX	15,437.51	15,519.98	▲	0.53%
	UK: FTSE 100	7,018.05	7,022.61	▲	0.06%
ASIA	China: Shanghai Composite	3,486.55	3,600.78	▲	3.28%
	Hong Kong: Hang Seng	28,458.44	29,124.41	▲	2.34%
	Japan: Nikkei 225	28,317.83	29,149.41	▲	2.94%
	Indian: S&P BSE Sensex	50,540.47	51,422.88	▲	1.75%
SOUTH AMERICA	Brazil: Bovespa	122,592.47	125,561.37	▲	2.42%
	Mexico: IPC All-Share	49,778.81	50,040.74	▲	0.53%
	Canada: S&P/TSX	19,527.30	19,852.18	▲	1.66%
AFRICA	South Africa: FTSE/JSE Africa All-Share	66,238.93	67,554.85	▲	1.99%
	Egypt: EGX 30	10,242.30	10,301.58	▲	0.58%
	Kenya: NSE	168.94	172.69	▲	2.22%
	Nigeria: ASI	38,324.07	38,256.99	▼	-0.18%

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