

Friday, January 27, 2023

Equity Market Wraps Up Transaction for the Week Negative; NGX-ASI Grew by +0.12% w/w

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	52,657.88	52,752.96 ↓	-0.18%
Total Market Cap.	₦Trillion	28.68	28.73 ↓	-0.18%
Total Volume Traded	Million	171.11	139.68 ↑	22.50%
Total Value Traded	₦Million	2,343.57	2,021.62 ↑	15.93%
Deals		3,599	3,549 ↑	1.41%

Trading activities on the Local Bourse closed for the week bearish, reversing the previous day's gain, as the market performance indicators (NGX-ASI and Market Capitalization) dropped by -0.18%. The market YTD returns stood at +2.74%, as investors' wealth reduced by ₦52 billion. The market index (All-Share Index) dropped by 95.08 basis points today, representing a decline of -0.18% to close at 52,657.88. The Market Capitalization also lost ₦51.79 billion, representing a decrease of -0.18% to close at ₦28,681.33 trillion from ₦28,733.12 trillion yesterday.

However, market activities were up, as the Total Volume and Total Value traded for the day grew by +22.50% and +15.93% accordingly. Approximately 171.11 million units valued at ₦2,343.57 million were transacted in 3,599 deals. FIDELITYBK was the most traded stock in terms of volume, accounting for 15.57% of the total volume of trades, followed by CHAMS (10.40%), FBNH (8.85%), JAPUALGOLD (5.30%), and GTCO (5.08%) to complete the top 5 on the volume chart, while MTNN was the most traded stock in value terms, with 17.39% of the total value of trades on the exchange.

CAP was topped the advancers' chart with a price appreciation of 9.83 percent, trailed by NNFM (9.76%), JAPUALGOLD (9.68%), TRIPPLEG (9.38%), CORNERST (9.26%), and nineteen (19) others. Eleven (11) stocks depreciated, and CUTIX was the top loser, with a price depreciation of -8.11% to close at ₦2.04, as INTBREW (-6.12%), GLAXOSMITH (-4.41%), ACCESSCORP (-4.26%), and GUINNESS (-3.71%) also dipped in price. In that regard, the market breadth closed positive, recording 24 gainers and 11 losers.

Furthermore, the market sector performance was positive, as three out of the five major market sectors were up, topped by the Insurance sector, which grew by (+0.36%), followed by the Oil & Gas sector (+0.13%), and the Industrial sector (+0.01%). The Consumer goods and Banking sectors declined by -0.39% and -0.03% respectively.

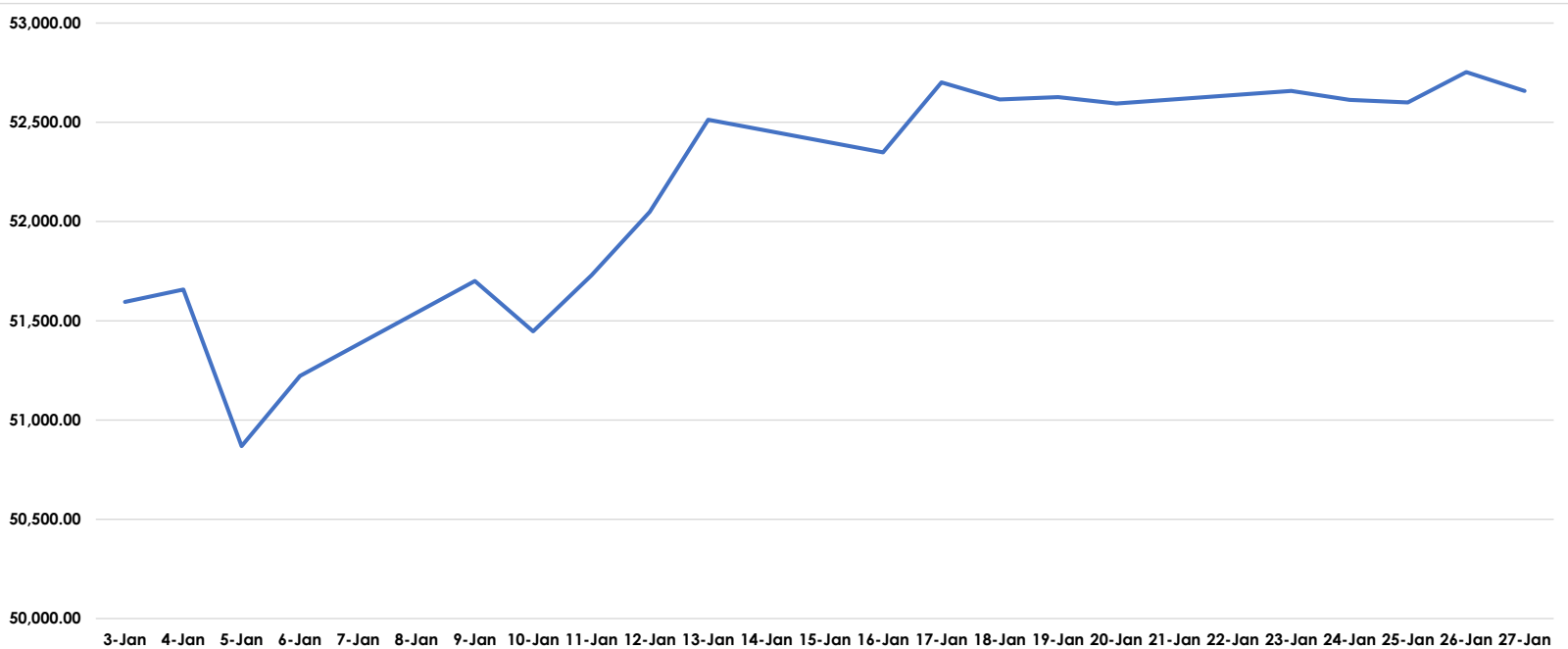
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
CAP	17.80	19.55	9.83%
NNFM	6.15	6.75	9.76%
JAPUALGOLD	0.31	0.34	9.68%
TRIPPLEG	0.96	1.05	9.38%
CORNERST	0.54	0.59	9.26%
INTENEGINS	0.58	0.63	8.62%
GEREGU	147.40	160.00	8.55%
ROYALEX	0.78	0.84	7.69%
REGALINS	0.27	0.28	3.70%
CHAMS	0.29	0.30	3.45%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
CUTIX	2.22	2.04	-8.11%
INTBREW	4.90	4.60	-6.12%
GLAXOSMITH	6.80	6.50	-4.41%
ACCESSCORP	9.40	9.00	-4.26%
GUINNESS	72.70	70.00	-3.71%
AIICO	0.65	0.63	-3.08%
UPDCREIT	3.25	3.15	-3.08%
CADBURY	11.85	11.55	-2.53%
OANDO	3.95	3.88	-1.77%
MTNN	229.00	225.00	-1.75%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
FIDELITYBK	Banking	26,644,503	15.57%
CHAMS	ICT	17,789,792	10.40%
FBNH	Banking	15,136,342	8.85%
JAPUALGOLD	Oil & Gas	9,073,872	5.30%
GTCO	Banking	8,689,784	5.08%
NGXGROUP	Financial Services	8,477,032	4.95%
MBENEFIT	Banking	6,468,101	3.78%
UBA	Insurance	5,840,411	3.41%
TRANSCORP	Conglomerate	5,383,541	3.15%
UNILEVER	Consumer goods	4,217,995	2.47%

Top 10 Traders By Value	Sector	Value (₦)	% of Mkt Value
MTNN	Telecom	407,497,606.80	17.39%
GEREGU	Utilities	311,009,754.50	13.27%
NGXGROUP	Financial services	222,565,655.10	9.50%
GTCO	Banking	211,926,882.65	9.04%
FBNH	Banking	177,191,697.45	7.56%
FIDELITYBK	Banking	145,133,358.41	6.19%
GUINNESS	Consumer goods	127,496,503.10	5.44%
ZENITHBANK	Banking	97,290,117.45	4.15%
AIRTELAFRI	Telecom	85,547,172.00	3.65%
STANBIC	Banking	55,856,008.95	2.38%

NGX-ASI Performance (YTD)



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Market Performance History			Sector Indices		A-Day Change		YTD % Change	
A-Day Change	↓	-0.18%	NGX-30	↓	-0.34%	↑	2.99%	
Week-on-Week	↑	0.12%	Banking	↓	-0.03%	↑	6.83%	
Month-to-Date	↑	2.74%	Consumer Goods	↓	-0.39%	↑	5.56%	
Quarter-to-Date	↑	2.74%	Industrial Goods	↑	0.01%	↑	2.03%	
Year-to-Date	↑	2.74%	Insurance	↑	0.36%	↑	3.59%	
52-Weeks High		54,085.30	Oil & Gas	↑	0.13%	↑	5.41%	
52-Weeks Low		43,461.60						

Economic Indicators		Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change			
Exchange Rate - I&E (₱/\$)		461.25	461.7	↓	-0.10%	↑	0.09%	1-Month	0.98%	↓	-0.45%
Exchange Rate - Parallel (₱/\$)		748.00	750	↓	-0.27%	↓	-0.54%	3-Month	1.66%	↓	-0.55%
Monetary Policy Rate (MPR)		17.50%	17.50%	⇒	0.00%	↑	1.00%	6-Month	3.09%	↓	-0.44%
Crude Oil Price (\$/Barrel)		88.92	87.47	↑	1.66%	↑	3.50%	9-Month	3.89%	↓	-0.43%
Foreign Reserve (\$'Bn)		37.10	37.12	↓	-0.067%	↑	0.04%	12-Month	4.10%	↓	-0.56%
Inflation Rate		21.34%	21.34%	⇒	0.00%	↓	-0.13%				

Note : -Crude oil (Brent) and Foreign Exchange price represents spot price as at the time this report was prepared
 -Foreign reserves figures have two-day lag
 -Inflation figure as at December 2022
 -NTB True Yield have a day's lag

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