

Monday, June 26, 2023

Increased Buying Interest Across Major Market Sectors Lifts Local Bourse by +0.22%

| Key Market Indicators | Units | Today | Previous Day | % Change |
|-----------------------|--------------|-----------|--------------|-----------|
| The All -Share Index | Basis Points | 59,338.76 | 59,206.63 | ↑ 0.22% |
| Total Market Cap. | ₦Trillion | 32.31 | 32.24 | ↑ 0.22% |
| Total Volume Traded | Million | 552.69 | 627.87 | ↓ -11.97% |
| Total Value Traded | ₦Million | 13,056.99 | 9,150.37 | ↑ 42.69% |
| Deals | | 8,052 | 6,953 | ↑ 15.81% |

The Nigerian equity market opened transaction for the new week bullish, as the market performance indicators (NGX-ASI and Market Capitalization) grew by +0.22%. The market YTD returns stood at +15.78%, as investors' wealth was up by approximately ₦72 billion. The market index (All-Share Index) added 132.13 basis points today, representing an increase of +0.22% to close at 59,338.76. The Market Capitalization also gained ₦71.94 billion, representing a growth of +0.22% to close at ₦32,308.67 trillion from ₦32,236.73 trillion last Friday.

However, market activities were mixed, as the Total Volume traded for the day decreased by -11.97%, while the Total Value traded was up by +42.69% respectively. Approximately 552.69 million units valued at ₦13,056.99 million were transacted in 8,052 deals. ACCESSCORP was the most traded stock in terms of volume, accounting for 13.53% of the total volume of trades, followed by BUACEMENT (8.23%), GTCO (8.13%), UNIVINSURE (7.32%), and ETI (7.22%) to complete the top 5 on the volume chart, while BUACEMENT was the most traded stock in value terms, with 29.58% of the total value of trades on the exchange.

ACADEMY, ABCTRANS, IKEJAHOTEL, TANTALIZER, THOMASWY, and TRANSCOHOT topped the advancers' chart for today with a price appreciation of 10.00 percent each, trailed by ETERNA (9.78%), SKYAVN (+9.73%), IMG (+9.52%), LEARNAFRCA (+9.36%), and thirty-five others. Twenty-three (23) stocks depreciated, where UNITYBNK was the top loser, with a price depreciation of -10.00% to close at ₦0.99, as JAPAULGOLD (-9.23%), VERITASKAP (-8.70%), CUTIX (-5.45%), BERGER (-4.07%), and FBNH (-16.90%) also dipped in price. In that regard, the market breadth closed positive, recording 45 gainers and 23 losers.

In addition, the market sector performance closed positive, as all the five major market sectors were up, led by the Banking sector (+2.40%), followed by the Insurance sector (+1.68%), the Industrial sector (+1.00%), the Oil & Gas sector (+0.52%), and the Consumer goods sector (+0.14%).

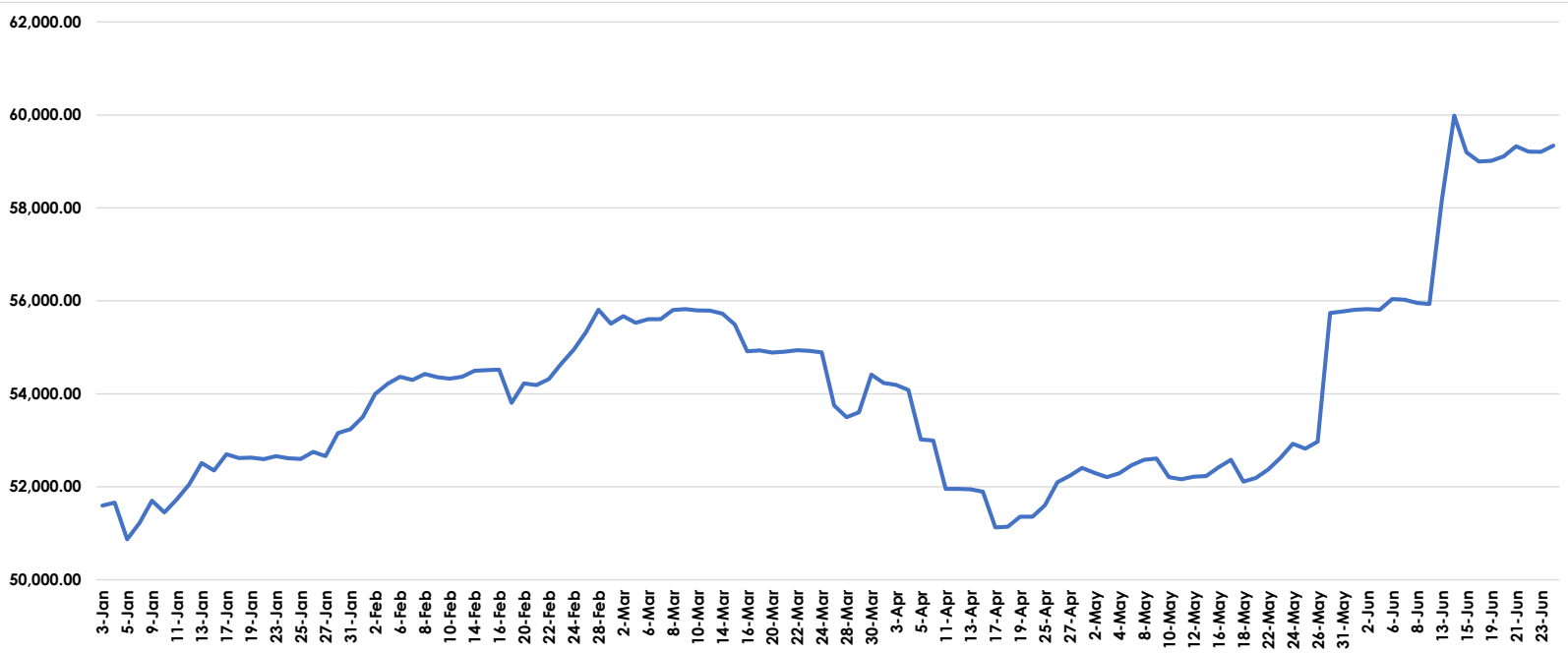
| Best 10 Performers | OPEN (₦) | Close (₦) | %Change |
|--------------------|----------|-----------|---------|
| ACADEMY | 2.00 | 2.20 | 10.00% |
| ABCTRANS | 0.40 | 0.44 | 10.00% |
| IKEJAHOTEL | 3.00 | 3.30 | 10.00% |
| TANTALIZER | 0.20 | 0.22 | 10.00% |
| THOMASWY | 1.30 | 1.43 | 10.00% |
| TRANSCOHOT | 17.60 | 19.36 | 10.00% |
| ETERNA | 15.85 | 17.40 | 9.78% |
| SKYAVN | 9.25 | 10.15 | 9.73% |
| IMG | 8.40 | 9.20 | 9.52% |
| LEARNAFRCA | 2.67 | 2.92 | 9.36% |

| Worst 10 Performers | OPEN (₦) | Close (₦) | %Change |
|---------------------|----------|-----------|---------|
| UNITYBNK | 1.10 | 0.99 | -10.00% |
| JAPAULGOLD | 0.65 | 0.59 | -9.23% |
| VERITASKAP | 0.23 | 0.21 | -8.70% |
| NSLTECH | 0.38 | 0.35 | -7.89% |
| CUTIX | 2.75 | 2.60 | -5.45% |
| BERGER | 10.45 | 10.00 | -4.31% |
| GUINEAINS | 0.24 | 0.23 | -4.17% |
| UNIVINSURE | 0.24 | 0.23 | -4.17% |
| NEM | 6.30 | 6.05 | -3.97% |
| FIDSON | 12.87 | 12.50 | -2.87% |

| Top 10 Traders By Volume | Sector | Volume (Units) | % of Mkt Volme |
|--------------------------|--------------|----------------|----------------|
| ACCESSCORP | Banking | 74,602,250 | 13.53% |
| BUACEMENT | Industrial | 45,405,509 | 8.23% |
| GTCO | Banking | 44,833,367 | 8.13% |
| UNIVINSURE | Insurance | 40,373,612 | 7.32% |
| ETI | Banking | 39,821,986 | 7.22% |
| UBA | Banking | 39,488,911 | 7.16% |
| ZENITHBANK | Banking | 28,574,335 | 5.18% |
| TRANSCORP | Conglomerate | 18,244,559 | 3.31% |
| FTNCOCOA | Agriculture | 13,252,641 | 2.40% |
| JAPAULGOLD | Oil & Gas | 11,700,497 | 2.12% |

| Top 10 Traders By Value | Sector | Value (₦) | % of Mkt Value |
|-------------------------|----------------|------------------|----------------|
| BUACEMENT | Industrial | 3,861,335,324.45 | 29.58% |
| AIRTELAFRI | Telecom | 2,613,071,970.00 | 20.02% |
| GTCO | Banking | 1,449,411,956.60 | 11.10% |
| ACCESSCORP | Banking | 1,134,046,681.00 | 8.69% |
| ZENITHBANK | Banking | 915,654,024.45 | 7.02% |
| ETI | Banking | 604,805,291.00 | 4.63% |
| UBA | Banking | 455,851,647.30 | 3.49% |
| MTNN | Telecom | 384,154,037.80 | 2.94% |
| NESTLE | Consumer goods | 139,964,783.50 | 1.07% |
| TOTAL | Oil & Gas | 129,122,387.70 | 0.99% |

NGX-ASI Performance (YTD)



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| Market Performance History | | | Sector Indices | | A-Day Change | | YTD % Change | |
|----------------------------|---|-----------|------------------|---|--------------|---|--------------|--|
| A-Day Change | ↑ | 0.22% | NGX-30 | ↑ | 0.17% | ↑ | 16.40% | |
| Week-on-Week | ↑ | 0.55% | Banking | ↑ | 2.40% | ↑ | 46.87% | |
| Month-to-Date | ↑ | 6.40% | Consumer Goods | ↑ | 0.14% | ↑ | 50.46% | |
| Quarter-to-Date | ↑ | 9.42% | Industrial Goods | ↑ | 1.00% | ↑ | 4.05% | |
| Year-to-Date | ↑ | 15.78% | Insurance | ↑ | 1.68% | ↑ | 58.56% | |
| 52-Weeks High | | 59,985.10 | Oil & Gas | ↑ | 0.52% | ↑ | 61.27% | |
| 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 (₺/\$) | 770.17 | 765.13 | ↑ | 0.65% | 1-Month | 2.88% | -0.44% |
| Exchange Rate - Parallel (₺/\$) | 765.00 | 763 | ↑ | 0.26% | 3-Month | 3.86% | -0.34% |
| Monetary Policy Rate (MPR) | 18.50% | 18.50% | ⇒ | 0.00% | 6-Month | 4.94% | -0.46% |
| Crude Oil Price (\$/Barrel) | 74.36 | 73.85 | ↑ | 0.69% | 9-Month | 7.28% | -0.21% |
| Foreign Reserve (\$'Bn) | 34.35 | 34.40 | ↓ | -0.133% | 12-Month | 8.26% | -0.26% |
| Inflation Rate | 22.41% | 22.41% | ⇒ | 0.00% | | | |

Note : -Crude oil (Brent) and Foreign Exchange price represents spot price as at the time this report was prepared
 -Foreign reserves figures have three-day lag
 -Inflation figure as at May 2023
 -NTB True Yield have a day's lag

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