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THE NIGERIAN EQUITY MARKET SUMMARY

Monday, August 5, 2024

Market Index Drops by 0.17%, as Local Bourse Sees Negative Start of the Week

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	97,582.41	97,745.73 🖖	-0.17%
Total Market Cap.	\ 'Trillion	55.40	55.50 🖖	-0.17%
Total Volume Traded	Million	324.20	210.91 🎓	53.71%
Total Value Traded	\ 'Million	6,217.76	3,951.27 🏫	57.36%
Deals		9,738	6,603 🏚	47.48%

The Nigerian domestic market resumed transactions for the new week negatively, with key performance indicators, the NGX-ASI and Market Capitalization, both dropping by 0.17%. The market index (All-Share Index) reduced by 163.32 basis points today, representing a drop of 0.17% to close at 97,582.41. Meanwhile, the Market Capitalization also lost \$\frac{1}{2}\$92.73 billion, representing a decline of 0.17%, to close at \$\frac{1}{2}\$5.40. The local market downturn was due to sell-offs in some medium and large-scale stocks such as MTNN, MAYBAKER, and others, as investors digest the first half of the year's performance of quoted companies amid high inflation and interest rates.

Nevertheless, market activities were up, as the Total Volume and Total Value traded for the day increased by +53.71% and +57.36% respectively. Approximately 324.20 million units valued at #6,217.76 million were transacted across 9,738 deals. ZENITHBANK was the most traded stock in terms of volume, accounting for 11.44% of the total volume of trades, followed by UBA (10.81%), VERITASKAP (7.89%), OANDO (6.27%), and ACCESSCORP (5.82%) to complete the top 5 on the volume chart. ZENITHBANK also emerged as the most traded stock in value terms, with 21.42% of the total value of trades on the exchange.

INTBREW, PRESCO and SOVRENINS topped the advancers' chart for today with a price appreciation of 10.00 percent each, trailed by OANDO with (+9.98%) growth, UCAP (+9.88%), HONYFLOUR (+9.74%), RTBRISCOE (+9.52%), CWG (+7.87%), and fifteen others. Twenty-five (25) stocks depreciated, where CHAMS was the top loser, with a price depreciation of -10.00%, as UPL (-9.92%), MAYBAKER (-7.67%), SUNUASSUR (-6.67%), MTNN (-5.95%), and WEMABANK (-3.17%) also dipped in price. In that regard, the market breadth closed negative, recording 23 gainers and 25 losers.

In addition, the market sector performance was positive, as three of the five major market sectors were up, led by the Consumer goods sector which grew by (+0.89%), followed by the Banking sector by (+0.19%), and the Industrial sector by (+0.03%), while the Insurance and Oil & Gas sectors dropped by -0.03% and -0.01% accordingly.

NTBREW 4.20	Best 10 Performers	OPEN (#)	Close (₩)	%Change
SOVERINIS	INTBREW			10.00%
CANIDO	PRESCO	441.00	485.10	10.00%
UCAP	SOVRENINS	0.50	0.55	10.00%
HONNEQUER 3.49 3.83 9.74% RTBRISCOE 0.84 0.92 9.52% 0.83 6.85 7.67% 0.92 0.83 0.83 0.83 7.44% 0.92	OANDO	25.30	27.80	9.88%
RERISCOE 0.84 0.92 9.55% 1.26% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.21 1.30 7.44% 1.22 1.30 7.44% 1.22 1.30 7.44% 1.22 1.30 7.44% 1.22 1.30 7.44% 1.22 1.30 7.45% 1.22 1.30 7.45% 1.22 1.30 7.45% 1.24 1.30 7.45% 1.24 1.30 7.45% 1.24 1.30 7.45% 1.24 1.30 7.45% 1.25 1.30 7.30 7.30 7.30 7.30 7.30 7.30 7.30 7	UCAP	12.15	13.35	9.88%
CWG 6.35 6.85 7.87% UPDC 1.21 1.30 7.47% UNIVINSURE 0.03 0.32 6.67% Word Close (N) %Change UPL 2.20 1.98 -10.00% UPL 2.18 2.00 -8.29% IPP 0.61 0.56 -8.20% MAYBAKER 0.61 0.56 -8.20% MAYBAKER 7.04 6.50 7.67% CHAMPION 3.26 3.01 7.67% DAARCOMM 0.45 0.42 -6.67% SUNIUSSUR 1.35 1.16 -6.67% SUNIUSSUR 2.14 2.00 -6.54% VERITASKAP 0.95 0.89 -6.32% VERITASKAP Bonking 3.497.39.29 10.81% VERITASKAP Bonking 3.497.39.29 10.81% VERITASKAP Bonking 3.497.39.29 10.81% VERITASKAP Bonking 3.497.39.29 10.81%	HONYFLOUR	3.49	3.83	9.74%
UPIC	RTBRISCOE	0.84	0.92	9.52%
No. Color	CWG	6.35	6.85	7.87%
Worst 10 Performer OPEN (N) Close (N) %Change CHAMS 2.20 1.98 -10.00% UPL 2.42 2.18 2.90 -8.26% TIP 2.18 2.00 -8.26% OMAIEK 0.61 0.56 -9.20% AMYBAKER 7.74 6.50 7.47% CHAMPION 3.26 3.01 7.47% DAARCOMM 0.45 0.42 -4.67% ACADEMY 2.14 2.00 -6.5% VERITASKAP 0.95 0.89 -6.32% TOP 10 Traders By Volume Sector Volume (Units) % of MM Volme ZENITHBANK Banking 36.973.955 11.4% UBA Banking 36.973.955 11.4% UBA Banking 34.973.929 10.81% OANDO OII & Gos 20.282.425 5.25% ACCESSCORP Banking 11.1846.845 3.66% AICO Insurance 14.917.280 4.61% <td< td=""><td>UPDC</td><td>1.21</td><td></td><td>7.44%</td></td<>	UPDC	1.21		7.44%
CHAMS	UNIVINSURE	0.30	0.32	6.67%
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SEPLAT Oil & Gas 179,034,228.00 2.88%		•		
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		Banking	145,075,159.15	2.33%

Telecom

139,909,531.00

2.25%





Monday, August 5, 2024

A member of CITIRUST GROUP							YTD % Change
Market Performance History		Sector Indices	Sector Indices		A-Day Change		
A-Day Change	Ψ.	-0.17%	NGX-30	Ψ.		-0.22% 👚	29.21%
Week-on-Week	₩	-0.56%	Banking	^		0.19% 🖖	-8.96%
Month-to Date	₩	-0.65%	Consumer Goods	^		0.89% 👚	35.24%
Quarter-to-Date	₩	-6.68%	Industrial Goods	↑		0.03% 👚	63.56%
Year-to-Date	^	30.50%	Insurance	₩		-0.03% 👚	19.22%
52-Weeks High		105,722.78	Oil & Gas	•		-0.01% 👚	49.43%
52-Weeks Low		64,167.39					

Economic Indicators	Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (\(\frac{\fin}{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac}\firk}}}{\firac{\fire}{\firac{\fir}{\firac{\fir}{\fire}}}}}}}{\frac{\frac{\firac{\fir}{\firac{\fir}{\firac{\fir\firac{\fir}{\firac{\fir\fir}{\firighta}}}}}}{\firac{\firac{\firac{\fir\fire}{\firac{\firac}{\firighta}}}}}{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\frac{\fir\fir}{\firi}}}}}{\firac{\firac{\fira}{\firac{\fir\firi}{\fi	1617.00	1570	2.91%	-55.02%	1-Month	20.11	% -0.41%
Exchange Rate - Parallel (N/\$)	1590.00	1590	→ 0.00%	-33.61%	3-Month	21.13	% ↑ 0.20%
Monetary Policy Rate (MPR)	26.75%	26.75%	→ 0.00%	8.00%	6-Month	23.96	%
Crude Oil Price (\$/Barrel)	75.33	76.81	-1.93%	-2.22%	9-Month	27.54	%
Foreign Reserve (\$'Bn)	36.83	36.80	0.08%	11.89%	12-Month	26.72	% ↑ 0.28%
Inflation Rate	34.19%	34.19%	→ 0.00%	5.99%			

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 June 2024
- -NTB True Yield have a day's lag

<u>Disclaimer</u>

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