

MARKET UPDATE

- It was another flat performance by the ASI today as market activities remained largely muted. The All share index dropped marginally by 6bps. Year-to-date, the index is down 0.73%.
- A total of 12 stocks gained points while 35 stocks lost points.
- Structured/Cross Trades – Sterling bank and Zenith.
- Only Zenith (\$2.2mn) and Presco (\$1.1mn) managed to cross the \$1mn mark today in terms of total value traded. Nothing much else, otherwise.

PERFORMANCE INDICATORS

INDICATOR	2018: OPEN	27-Jun-18	26-Jun-18	Daily change (%)	YTD Change (%)
NSE All-Share Index	38,243.19	37,963.93	37,988.54	↓ -0.06%	-0.73%
Market Capitalisation (N'bn)	13,609.47	13,752.45	13,761.36	↓ -0.06%	1.05%
NSE BANKING	475.44	476.89	479.65	↓ -0.58%	0.30%
NSE PENSION	1,379.74	1,479.69	1,481.14	↓ -0.10%	7.24%
NSE CONSUMER GOODS	976.10	897.39	898.84	↓ -0.16%	-8.06%
NSE OIL AND GAS	330.69	321.14	320.18	↑ 0.30%	-2.89%
NSE 50	1,950.09	1,957.48	1,961.47	↓ -0.20%	0.38%
NSE INDUSTRIAL	1,975.59	1,988.63	1,970.90	↑ 0.90%	0.66%
NSE PREMIUM	2,564.13	2,727.29	2,731.29	↓ -0.15%	6.36%
NSE 30	1,746.68	1,720.88	1,720.74	↑ 0.01%	-1.48%
Volume Traded (N'mn)	536.84	372.24	258.70	↑ 43.89%	-30.66%
Value (N'mn)	2,742.97	3,179.91	3,165.92	↑ 0.44%	15.93%

MACRO-ECONOMIC INDICATORS

INDICATORS	Current	Previous	Change	Direction	Frequency
Monetary Policy Rate (%)	14.00	14.00	0.00	↔	Bi-monthly
Headline Inflation Rate (%)	11.61	12.48	-0.87	↓	Monthly
GDP growth rate (%)	1.95	2.11	-0.16	↓	Quarterly
Oil price (Brent Crude)*	77.25	76.31	0.94	↑	Daily
External Reserves (\$'billion)	47.62	47.58	0.04	↑	Daily

FX MARKET SNAPSHOT

CURRENCY	2018: OPEN	27-Jun-18	26-Jun-18	Change	YTD (%)
USD/NGN*	359.99	360.99	361.30	0.31	-0.09%
EUR/NGN*	431.58	418.43	421.08	2.65	-0.63%
GBP/NGN*	486.33	474.25	477.95	3.70	-0.77%

*Sources: Bloomberg, Central Bank of Nigeria, NBS, Stanbic IBTC Global Markets

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TOP GAINERS

COMPANY	27-Jun-18	CHANGE (%)
CILEASING	2.02	4.66%
UNITYBANK	0.93	4.49%
TRANSCORP	1.43	4.38%
UBN	6.15	4.24%
AFRIPRUD	4.00	3.90%

TOP LOSERS

COMPANY	27-Jun-18	CHANGE (%)
JAPAUOIL	0.38	-7.32%
ETERNA	6.41	-5.04%
FIRSTALUM	0.38	-5.00%
PRESTIGE	0.57	-5.00%
CCNN	23.50	-4.86%

COMPANY	VOLUME	COMPANY	VALUE (N)
STERLINGBANK	172.63m	ZENITHBANK	792.74m
ZENITHBANK	31.53m	PRESKO	404.37m
TRANSCORP	22.92m	GUINNESS	277.90m
UCAP	21.18m	STERLINGBANK	241.03m
UBA	16.62m	SEPLAT	232.04m

TOP PICKS

COMPANY	TP	CMP	RECOM
ACCESS	13.71	10.30	BUY
GUARANTY	57.00	40.70	BUY
FBNH	12.50	10.85	BUY
ZENITHBANK	35.00	25.00	BUY
UNILEVER	67.00	51.00	BUY
OKOMUOIL	101.00	92.50	BUY
NASCON	30.00	22.75	BUY
DANGSUGAR	29.00	19.00	BUY
NESTLE	1,902.00	1,500.00	BUY

NIGERIA ALL-SHARE INDEX (ASI) TREND



27 June 2018

DAILY

NIGERIAN MARKET WRAP



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