



WEEKLY CAPITAL MARKET REVIEW

FOR THE WEEK ENDED 29th NOVEMBER 2024

2nd December, 2024

IMPORTANT INFORMATION for the week ended 29th November, 2024

Access Holdings Plc ('Access Holdings' or 'the Company') is pleased to announce that its flagship subsidiary, Access Bank Plc ('Access Bank' or 'the Bank') has completed the acquisition of Standard Chartered Bank Angola S.A and Standard Chartered Bank (Sierra Leone) Limited ('the Acquisitions').

Julius Berger Nigeria Pie ("Julius Berger" or "the Company") hereby announces to the Nigerian Exchange Limited and the investing public that the Federal Ministry of Works has formally terminated the contract for the Rehabilitation of Abuja-Kaduna-Zaria-Kano Road in the FCT, Kaduna and Kano States, Contract No. 6350 originally awarded to the Company in December 2017.

Notore Chemical Industries Plc ("Notore" or "the Company") hereby notifies the Nigerian Exchange Limited ("NGX"), the investing public and our esteemed stakeholders that the Company has received an offer from Kwararafa Africa Limited, acting along with TY Holdings Limited and Notore Chemical Industries (Mauritius) Limited (together, the "Core Shareholders"), to acquire all the shares being held by the minority shareholders in Notore (the "Scheme Shareholders").

MARKET REVIEW for the week ended 29th November, 2024

A total turnover of 3.194 billion shares worth N54.850 billion in 45,112 deals was traded this week by investors on the floor of the Exchange, in contrast to a total of 1.952 billion shares valued at N35.864 billion that exchanged hands last week in 48,553 deals. The Financial Services Industry (measured by volume) led the activity chart with 1.509 billion shares valued at N26.904 billion traded in 20,357 deals; thus contributing 47.25% and 49.05% to the total equity turnover volume and value respectively. The Construction/Real Estate Industry followed with 839.945 million shares worth N4.806 billion in 1,399 deals. Third place was the Oil and Gas Industry, with a turnover of 256.445 million shares worth N13.307 billion in 6,313 deals. Trading in the top three equities namely Haldane McCall Plc, FBN Holdings Plc and Japaul Gold and Ventures Plc (measured by volume) accounted for 1.587 billion shares worth N19.797 billion in 3,632 deals, contributing 49.69% and 36.09% to the total equity turnover volume and value respectively.

EQUITY TURNOVER FOR THE LAST WEEK

Date	Deals	Turnover Volume	Turnover Value (N)	Traded Stocks	Advanced Stocks	Declined Stocks	Unchanged Stocks
11/25/2024	10464	671,260,264	10,639,893,708.83	126	29	30	67
11/26/2024	9305	552,110,061	8,031,310,614.56	126	24	25	77
11/27/2024	9385	822,462,284	10,285,517,800.00	127	23	26	78
11/28/2024	8404	632,741,250	10,811,026,140.14	125	28	30	67
11/29/2024	7554	515,494,184	15,082,540,050.47	121	22	26	73

BONDS

A total of 189,346 units valued at N187.047 million were traded this week in 28 deals compared with a total of 149,349 units valued at N152.438 million transacted last week in 30 deals.

S/N	Security	Deals	Volume	Value
1	FGSUK2033S6	14	149650	155,733,616.31
2	FGSUK2027S3	3	30011	22,570,017.79
3	FGSUK2031S4	3	6860	6,406,671.15
4	TAJSUKS1	1	1000	999,990.00
5	FGS202549	1	1000	723,041.76
6	FG142027S1	2	790	580,016.13
7	FGSUK2025S2	1	20	20,750.37
8	FGS202551	1	10	6,141.43
9	FGS202768	1	3	4,468.38
10	FGS202650	1	2	2,030.24
	TOTAL	28	189346	187,046,743.56

INDEX MOVEMENT

The NGX All-Share Index and Market Capitalization depreciated by 0.33% and 0.31% to close the week at 97,506.87 and N59.107 trillion respectively. Similarly, all other indices finished lower with the exception of NGX Insurance, NGX AFR Div Yield, NGX Lotus II, NGX Industrial Goods and NGX Growth which appreciated by 1.23%, 0.84%, 0.99% 0.62% and 5.59% respectively while the NGX ASeM index closed flat. (See a summary of index movements in the table below):

INDEX	WEEK CLOSE 11/22/2024	WEEK CLOSE 11/29/2024	WEEKLY CHANGE	WtD	MtD	QtD	YtD
				% Change			
NGX All-Share Index (ASI)	97829.02	97506.87	-322.15	-0.33	-0.15	-1.07	30.4
NGX-Main Board Index	4749.73	4739.66	-10.07	-0.21	-0.87	-1.91	36.94
NGX 30 Index	3681.15	3666.31	-14.84	-0.40	-0.04	0.13	31.4
NGX CG Index	2636.19	2608.09	-28.1	-1.07	1.95	8.53	18.06
NGX Premium Index	9215.88	9162.86	-53.02	-0.58	1.49	1.24	26.78
NGX Banking Index	1026.07	1023.22	-2.85	-0.28	3.39	8.34	14.05
NGX Pension Index	4294.36	4267.47	-26.89	-0.63	1.5	6.34	31.67
NGX Insurance Index	482	487.91	5.91	1.23	9.11	13.49	51.69
NGX ASeM Index	1583.71	1583.71	0	0.00	0	0	147.63
NGX-AFR Bank Value Index	2370.7	2361.71	-8.99	-0.38	4.99	12.79	13.79
NGX AFR Div Yield Index	14808.82	14933.04	124.22	0.84	4.49	8.45	101.15
NGX MERI Growth Index	6045.89	6044.39	-1.5	-0.02	5.13	11.42	32.92
NGX MERI Value Index	9833.03	9538.84	-294.19	-2.99	1.88	22.37	83.64
NGX Consumer Goods Index	1595.74	1589.61	-6.13	-0.38	2.4	1.63	41.77
NGX Oil/Gas Index	2428.29	2381.31	-46.98	-1.93	3.2	19.61	128.3
NGX Lotus II	6083.69	6144.14	60.45	0.99	5.58	0.58	33
NGX Industrial Goods Index	3504.69	3526.38	21.69	0.62	2.14	-7.36	30.02
NGX Growth Index	5854.64	6182.19	327.55	5.59	-8.49	26.57	-1.86
NGX Sovereign Bond Index	629.31	622.71	-6.6	-1.05	-1.36	-0.25	-18.04
NGX Pension Board Index	1748	1740.89	-7.11	-0.41	0.63	1.39	33.04

SUMMARY OF PRICE CHANGES

Thirty-two (32) equities appreciated in price during the week lower than fifty-two (52) equities in the previous week. Forty-six (46) equities depreciated in price higher than thirty three (33) in the previous week, while seventy-five (75) equities remained unchanged, higher sixty-eight (68) recorded in the previous week.

TOP 10 GAINERS

Company	Open	Close	Gain (N)	% Change
SUNU ASSURANCES NIGERIA PLC.	3.16	3.9	0.74	23.42
HALDANE MCCALL PLC	5.1	6.2	1.1	21.57
SOVEREIGN TRUST INSURANCE PLC	0.63	0.73	0.1	15.87
NASCON ALLIED INDUSTRIES PLC	28.65	32.4	3.75	13.09
NEIMETH INTERNATIONAL PHARMACEUTICALS PLC	1.96	2.18	0.22	11.22
NCR (NIGERIA) PLC.	4.32	4.74	0.42	9.72
MECURE INDUSTRIES PLC	10.55	11.45	0.9	8.53
FTN COCOA PROCESSORS PLC	1.78	1.93	0.15	8.43
LAFARGE AFRICA PLC.	54	58	4	7.41
VITAFOAM NIG PLC.	22	23.5	1.5	6.82

TOP 10 LOSERS

Company	Open	Close	Loss (N)	% Change
AUSTIN LAZ & COMPANY PLC	2.66	1.96	-0.7	-26.32
JOHN HOLT PLC.	11	8.92	-2.08	-18.91
LASACO ASSURANCE PLC.	2.55	2.13	-0.42	-16.47
ETERNA PLC.	24.8	20.8	-4	-16.13
DEAP CAPITAL MANAGEMENT & TRUST PLC	1.18	1.06	-0.12	-10.17
UNILEVER NIGERIA PLC.	29.6	26.65	-2.95	-9.97
MULTIVERSE MINING AND EXPLORATION PLC	6.55	5.9	-0.65	-9.92
SECURE ELECTRONIC TECHNOLOGY PLC	0.61	0.55	-0.06	-9.84
ACADEMY PRESS PLC.	3.09	2.79	-0.3	-9.71
GUINEA INSURANCE PLC.	0.55	0.5	-0.05	-9.09

Chapel Hill Denham Management Limited: Listing of Chapel Hill Denham Management Limited's Series 10 Nigeria Infrastructure Debt Fund of 93,950,000 Units of N100.00 each at N109.43 per unit under the N200 Billion Issuance Program

Trading Licence Holders are hereby notified that additional listing of 93,950,000 units of N100 each at N109.43 per unit of Chapel Hill Denham Management Limited's Nigerian Infrastructure Debt Fund under the N200 Billion Issuance Program were on Thursday, 28 November 2024 listed on the Daily Official List of Nigerian Exchange Limited (NGX). With this listing of the additional 93,950,000 ordinary shares, the total issued units of Chapel Hill Denham Management Limited Nigerian Infrastructure Debt Fund has now increased from 961,342,005 to 1,055,292,005 ordinary shares of N100 each.