

Daily Market Report



Monday, July 21, 2025

ASI starts the week bullish.... appreciating by 18bps for the day

The local bourse (NGX) appreciated by **18bps** driven by price appreciation and increase buying interest in **NGX30**, **NGXINDUSTR**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **131,826.77**.

Market Capitalization closed positively at **N83.39trillion**, as investors gained **N152.52billion**, and Year-to-date (YtD) gain increased to **28.08%**

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **PRESCO (5.14%)**, **WAPCO (1.75%)**, **FIDELITYBK (3.12%)** and **BUACEMENT (5.19%)** offsetting losses in **GTCO (-0.58%)**, **ZENITHBANK (-1.39%)**, **ACCESSCORP (-1.3%)** and **UBA (-0.43%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXINDUSTR**. The market breadth measured by advancers/ decliners was negative closing at **0.68x**, indicating more laggards than advancers. The top gainers include **CUTIX (10%)**, **INTENEGINS (10%)**, **NCR (10%)**, **TIP (9.97%)** and **CAVERTON (9.75%)**

Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and profit taken in **NGXBNK**, **NGXCG**, **NGXINS**, **NGXOILGAS** except **NGX30**, **NGXINDUSTR** which closed positively. As a result, the year-to-date (YTD) gain increased to **28.08%**

At the close of today's trade, **MEYER (-10%)**, **MCNICHOLS (-9.95%)**, **THOMASWY (-9.84%)**, **DEAPCAP (-9.77%)** and **SOVRENINS (-9.63%)** were among the 45 market laggards as 128 stocks traded today

Market activity, measured by aggregate volume, decreased by **40.83%**, with an aggregate value depreciating by **49.58%**. Investors traded a total of **706.02mn** units of shares valued at **N21.55bn** in **30,621 deals**.

The most active stocks by volume were **ACCESSCORP**, which traded **61.73mn** units, followed by **CONHALLPLC** with **43.98mn** units, **CHAMS** with **38.66mn** units, **UBA** with **32.88mn**, and **ZENITHBANK** with **24.60mn** units

The most active stocks by value were **PRESCO**, which traded **3.11bn** units, followed by **GTCO** with **2.05bn** units, **ZENITHBANK** with **1.72bn** units, **ACCESSCORP** with **1.63bn**, and **WAPCO** with **1.55bn** units.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	6.80	0.14
NGXBNK	-5.75	-0.37
NGXCG	-10.23	-0.25
NGXINDUSTR	65.76	1.50
NGXINS	-11.75	-1.35
NGXOILGAS	-2.41	-0.10

NGX Market Indices

All Share Index	131,826.77
Previous ASI	131,585.66
% Day Change	0.18%
% Weekly Change	0.18%
No. of Deals	30,621
Volume	706,021,652
Value	21,559,200,469.57
Market Cap	83,393,676,314,829.60
1 Month High	131,826.77
1 Month Low	119,741.26

NGX Top Gainers

Symbols	Daily	Price (₦)
CUTIX	0.37	4.07
INTENEGINS	0.2	2.2
UPDC	0.66	7.26
TIP	1.00	11.03
CAVERTON	0.63	7.09

NGX Top Losers

Symbols	Daily ▼	Price (₦)
MEYER	-2.10	18.90
MCNICHOLS	-0.38	3.44
THOMASWY	-0.37	3.39
DEAPCAP	-0.13	1.20
SOVRENINS	-0.13	1.22

NGX Top Volume

Symbols	Price (₦)	Volumes
ACCESSCORP	26.50	61,732,260
CONHALLPLC	3.02	43,984,382
CHAMS	3.0	38,661,849
UBA	45.85	32,888,193
ZENITHBANK	71.00	24,603,893

NGX Top Value

Symbols	Price (₦)	Values
PRESCO	1,330.00	3,110,267,936.60
GTCO	94.50	2,057,972,800.50
ZENITHBANK	71.00	1,727,708,485.15
ACCESSCORP	26.50	1,635,680,139.80
WAPCO	116.00	1,558,721,911.90

CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
FIRSTHOLDCO	0.60	12 th May, 2025	23 rd May, 2025
Fidelity Bank	1.25	16 th April 2025	29 th April 2025
Zenith	5.00	16 th April 2025	29 th April 2025
United capital PLC	0.50	14 th March 2025	4 th April 2025
Seplat	US0.36	9 th May 2025	23 rd May 2025
Oando (Bonus issue) tranche 2	1:12	30 th June 2025	36 months
Transpower	3.50		11 th March 2025
HMCALL	0.07		31 st April 2025
TranscorpHotel	0.64	25 th March 2025	16 th April 2025
NIDF	5.50	30 th January 2025	6 th February 2025
WAPCO	1.20	28 th March 2025	25 th April 2025
NGXGROUP	2.00	13 th March 2025	
Champion Breweries PLC	0.60	9 th May 2025	21 st May 2025
Dangote Cement PLC	30.00	9 th June 2025	23 rd June 2025
BUA Cement PLC	2.05	8 th August 2025	28 th August 2025

NASD Market

The NASD market closed flat after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,488.74**. Furthermore, Market Capitalization closed flat at **N2.04trillion**. Market activity measured by aggregate volume closed flat at **125,865,839 units** while values closed flat at **403,109,501.60** in **24** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	44,412.82	44,470.92	0.13%
S&P 500	6,297.36	6,331.87	0.55%
FTSE 100 INDEX	8,977.09	8,986.81	0.11%
GERMAN DAX	24,312.79	24,276.23	0.15%
FRENCH CAC	9,156.21	9,103.70	0.57%
NIKKEI 225	39,819.11	39,819.11	0.00%
NGX (ASI)	131,585.21	131,585.66	0.18%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.46	3.19
INFLATION (%)	22.22	22.97
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50	27.50
BRENT CRUDE (US \$)	68.61	68.71

WORDS	MEANING
NASD	National Association of Securities Dealers
Bearish	Decline in prices, negative sentiments, downward trend
Bullish	Surge in prices, positive sentiments, upward trend
Y-o-Y	Year-on-Year
M-o-M	Month-on-Month
Y-t-d	Year-to-date
W-o-W	Week-on-week
BPS	Basis Points

MBC Securities Limited

11th Floor, St. Nicholas House,
26, Catholic Mission Street,
Lagos Island, Lagos
Nigeria
+234 02 012708003/4
www.mbcgroup.com.ng

The contents of this publication serve as a matter of information only and do not represent an advice to buy or sell stock. MBC Securities Limited does not bear liability for trading actions based on information contained in this publication. For further enquires please call +234-1-2708003-4, or E-mail us at enquiries@mbcgroup.com.ng and info@mbcgroup.com.ng