

# Daily Market Report



Friday, July 25, 2025

The ASI closed the week bullish, up 218bps and appreciating by 94bps for the day, marking its ninth consecutive weekly gain.

The ASI marked its ninth straight week of gains, closing the week with a **218bps** increase. In today's market, the local bourse (NGX) closed the day on a bullish note as ASI appreciated by **94bps** driven by price appreciation and increase buying interest in all sectoral tickers. As a result, the benchmark All Share Index (ASI) closed positively to settle at **134,452.93**.

Market Capitalization closed positively at **N85.85trillion**, as investors gained **N800.06billion**, and Year-to-date (YtD) gain increased to **30.63%**

## What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **OKOMUOIL (5.05%)**, **MTNN (1.27%)**, **PRESCO (7.68%)** and **ZENITHBANK (1.09%)** offsetting losses in **GTCO (-0.11%)**, **ACCESSCORP (-2.81%)**, **NB (-0.21%)** and **VFDGROUP (-1.52%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS**. The market breadth measured by advancers/decliners was positive closing at **2.18x**, indicating more advancers than laggards. The top gainers include **CHAMPION (10%)**, **IKEJAHOTEL (10%)**, **UNILEVER (10%)**, **ENAMELWA (9.98%)** and **TIP (9.95%)**

## Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to an increase in buying interest in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS**. As a result, the year-to-date (YTD) gain increased to **30.63%**

At the close of today's trade, **TRIPPLEG (-10%)**, **TANTALIZER (-8.55%)**, **SUNUASSUR (-6.64%)**, **ETI (-5.88%)** and **NEIMETH (-4.55%)** were among the **22** market laggards as **127** stocks traded today.

Market activity, measured by aggregate volume, decreased by **12.79%**, while aggregate value depreciating by **6.92%**. Investors traded a total of **713.71mn** units of shares valued at **N24.23bn** in **24,758** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **42.42mn** units, followed by **UNIVINSURE** with **40.68mn** units, **TANTALIZER** with **32.19mn** units, **GTCO** with **28.70mn**, and **ELLAHLAKES** with **26.34mn** units.

The most active stocks by value were **GTCO**, which traded **2.69bn** units, followed by **OKOMUOIL** with **2.57bn** units, **SEPLAT** with **1.8bn** units, **MTNN** with **1.37bn**, and **PRESCO** with **1.36bn** units.

## SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	44.05	0.90
NGXBNK	9.16	0.59
NGXCG	25.96	0.64
NGXINDUSTR	27.43	0.60
NGXINS	11.70	1.32
NGXOILGAS	12.10	0.50

## NGX Market Indices

All Share Index	134,452.93
Previous ASI	133,199.99
% Day Change	0.94%
% Weekly Change	2.18%
No. of Deals	24,758
Volume	713,712,400
Value	24,233,961,451.58
Market Cap	85,855,311,292,174.10
1 Month High	134,452.93
1 Month Low	114,910.16

## NGX Top Gainers

Symbols	Daily	Price (₦)
CHAMPION	1.12	12.32
IKEJAHOTEL	2.1	23.1
UNILEVER	6.2	68.2
ENAMELWA	2.45	27
TIP	1.46	16.13

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
TRIPPLEG	-0.39	3.51
TANTALIZER	-0.23	2.46
SUNUASSUR	-0.33	4.64
ETI	-2.00	32.00
NEIMETH	-0.31	6.50

## NGX Top Volume

Symbols	Price (₦)	Volumes
ACCESSCORP	27.70	42,422,207
UNIVINSURE	0.72	40,688,376
TANTALIZER	2.46	32,198,947
GTCO	94.00	28,705,241
ELLAHLAKES	9.80	26,343,151

## NGX Top Value

Symbols	Price (₦)	Values
GTCO	94.00	2,698,454,846.40
OKOMUOIL	998.00	2,575,515,449.80
SEPLAT	5,450.00	1,804,330,621.30
MTNN	400.00	1,376,935,666.90
PRESCO	1,550.00	1,365,493,166.30

## CORPORATE ACTION

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

## NASD Market

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,633.79**. Furthermore, Market Capitalization closed positively at **N2,127.76trillion**. Market activity measured by aggregate volume increased to **1,443,898 units** while values increased to **35,526,559.10** in **69** deals.

## GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	44,850.77	44,802.39	0.11%
S&P 500	6,376.05	6,378.18	0.03%
FTSE 100 INDEX	9,136.34	9,124.20	0.13%
GERMAN DAX	24,279.65	24,237.03	0.18%
FRENCH CAC	9,150.09	9,175.58	0.28%
NIKKEI 225	41,826.34	41,456.23	0.88%
NGX (ASI)	133,199.99	133,199.99	0.47%

## MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.13	3.49
INFLATION (%)	22.22	22.97
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50	27.50
BRENT CRUDE (US \$)	69.30	68.61

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

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