

Daily Market Report



Tuesday, August 5, 2025

ASI closes its 25th daily gaining streak...the local bouse appreciated by 50bps today

The local bourse (NGX) closed the day on a bullish note as ASI increased by **50bps** driven by price appreciation and increased buying interest in all sectoral tickers except **NGXBNK**, **NGXCG**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **144,796.37**.

Market Capitalization closed positively at **N91.6trillion**, as investors gained **N456.86billion**, and Year-to-date (YtD) gain increased to **40.68%**

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **FIDELITYBK (1.42%)**, **UACN (2.99%)**, **ARADEL (1.17%)** and **BUACEMENT (10%)** offsetting losses in **GTCO (-1%)**, **ZENITHBANK (-1.3%)**, **WAPCO (-1.68%)** and **ACCESSCORP (-1.62%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS**. The market breadth measured by advancers/ decliners was positive closing at **2.50x**, indicating more advancers than laggards. The top gainers include **BUACEMENT (10%)**, **ENAMELWA (10%)**, **MBENEFIT (10%)**, **NEIMETH (10%)** and **SUNUASSUR (10%)**.

Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increase buying interest in **NGX30**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS** except **NGXBNK**, **NGXCG** which closed negatively. As a result, the year-to-date (YTD) gain increased to **40.68%**

At the close of today's trade, **LIVINGTRUST (-9.86%)**, **UPDCREIT (-9.63%)**, **ACADEMY (-9.6%)**, **MECURE (-9.2%)** and **CADBURY (-7.35%)** were among the **22** market laggards as **129** stocks traded today.

Market activity, measured by aggregate volume, increased by **26.82%**, with aggregate value appreciating by **17.26%**. Investors traded a total of **1.02bn** units of shares valued at **N22.82bn** in **38,789** deals.

The most active stocks by volume were **AIICO**, which traded **97.10mn** units, followed by **UNIVINSURE** with **87.25mn** units, **LINKASSURE** with **64.03mn** units, **FIDELITYBK** with **59.21mn**, and **VERITASKAP** with **50.17mn** units.

The most active stocks by value were **GTCO**, which traded **3.92bn** units, followed by **FIDELITYBK** with **1.24bn** units, **ZENITHBANK** with **1.22bn** units, **STANBIC** with **1.09bn**, and **WAPCO** with **1.08bn** units.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	19.33	0.37
NGXBNK	-13.95	-0.86
NGXCG	-26.54	-0.61
NGXINDUSTR	179.27	3.35
NGXINS	68.90	7.51
NGXOILGAS	21.85	0.91

NGX Market Indices

All Share Index	144,796.37
Previous ASI	144,074.23
% Day Change	0.50%
% Weekly Change	2.50%
No. of Deals	38,789
Volume	1,027,858,737
Value	22,823,857,569.34
Market Cap	91,606,652,507,605.50
1 Month High	144,796.37
1 Month Low	141,263.05

NGX Top Gainers

Symbols	Daily	Price (₦)
BUACEMENT	15.5	170.5
ENAMELWA	2.7	29.7
MBENEFIT	0.2	2.2
NEIMETH	0.7	7.7
SUNUASSUR	0.44	4.84

NGX Top Losers

Symbols	Daily ▼	Price (₦)
LIVINGTRUST	-0.65	5.94
UPDCREIT	-0.90	8.45
ACADEMY	-0.95	8.95
MECURE	-1.60	15.80
CADBURY	-5.00	63.00

NGX Top Volume

Symbols	Price (₦)	Volumes
AIICO	2.64	97,102,896
UNIVINSURE	0.83	87,258,352
LINKASSURE	1.59	64,033,211
FIDELITYBK	21.50	59,213,648
VERITASKAP	1.67	50,176,367

NGX Top Value

Symbols	Price (₦)	Values
GTCO	99.00	3,925,810,414.00
FIDELITYBK	21.50	1,247,441,167.85
ZENITHBANK	75.90	1,227,399,399.45
STANBIC	101.00	1,094,936,802.40
WAPCO	146.50	1,087,653,309.00

CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
Custodian Investment Plc	0.25	August 15, 2025	September 9, 2025,
PRESKO	20.00	November 7, 2025	November 21, 2025
SEPLAT	\$0.046	August 13, 2025	August 28, 2025
Ikeja Hotel	0.03	August 8, 2025	September 5, 2025
Africa Prudential PLC	0.10	August 8, 2025	August 18, 2025
Transcorp Power PLC	1.50	August 8, 2025	August 18, 2025
United Capital PLC	0.30	August 8, 2025	August 18, 2025
Unilever Nigeria PLC	0.50	August 8, 2025	August 22, 2025
Transcorp Hotels PLC	0.10	August 7, 2025	August 15, 2025
Okomu Oil	30.00	August 8, 2025	August 22, 2025

NASD Market

The NASD market closed negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,700.01**. Furthermore, Market Capitalization closed negatively at **N 2,166.79 trillion**. Market activity measured by aggregate volume increased by **1,203,961 units** while values decreased by **28,540,574.95** in **33** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	43,939.87	44,127.49	0.43%
S&P 500	6,302.23	6,333.86	0.50%
FTSE 100 INDEX	9,104.10	9,154.95	0.56%
GERMAN DAX	23,738.30	23,898.18	0.67%
FRENCH CAC	8,890.57	8,913.74	0.26%
NIKKEI 225	40,290.70	40,549.54	0.64%
NGX (ASI)	144,074.23	144,796.37	1.99%

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 \$)	67.95	68.16

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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