

Daily Market Report



Thursday, Aug 14, 2025

The bears took over the market todayas ASI depreciated by 34bps

In today's market, the local bourse (NGX) closed the day on a bearish note as ASI depreciated by **34bps** driven by price depreciation and selling pressure in all sectoral tickers except **NGXINDUSTR**. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **145,367.03**.

Market Capitalization closed negatively at **N91.96trillion**, as investors lost **N314.92billion**, and Year-to-date (YtD) gain decreased to **41.23%**.

What shaped today's market direction

The loss in today's market can majorly be attributed price depreciation and selling pressure in **ELLAHLAKES (-9.97%)**, **ZENITHBANK (-0.76%)**, **AIICO (-9.89%)** and **GTCO (-0.51%)** with offsetting gains in **ACCESSCORP (0.18%)**, **FIRSTHOLDCO (0.15%)**, **ETI (0.66%)** and **UBA (0.52%)** which kept the ASI in negative terrain. losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS** and **NGXOILGAS**. The market breadth measured by advancers/decliners was negative, closing at **0.39x**, indicating laggards more than advancers. The top gainers include **AUSTINLAZ (9.91%)**, **NCR (9.43%)**, **THOMASWY (8.19%)**, **CHAMS (8.06%)** and **RTBRISCOE (5.88%)**

Sectoral performance was negative

Sectoral performance was negative. Some of our observed indices closed negatively due to price depreciation in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS** and **NGXOILGAS** while **NGXINDUSTR** closed positively. As a result, the year-to-date (YTD) gain decreased to **41.23%**.

At the close of today's trade, **CILEASING (-10%)**, **SOVRENINS (-10%)**, **LASACO (-10%)**, **UPDC (-10%)** and **WEMABANK (-10%)** were among the **51** market laggards as **126** stocks traded today.

Market activity, measured by aggregate volume, increased by **82.96%**, with aggregate value appreciating by **9.87%**. Investors traded a total of **2.45bn** units of shares valued at **N22.21bn** in **43,366** deals.

The most active stocks by volume were **UNIVINSURE**, which traded **390.39mn** units, followed by **AIICO** with **236.57mn** units, **LINKASSURE** with **214.26mn** units, **MBENEFIT** with **157.53mn**, and **REGALINS** with **109.85mn** units.

The most active stocks by value were **NB**, which traded **1.86bn** units, followed by **ELLAHLAKES** with **1.77bn** units, **ACCESSCORP** with **1.28bn** units, **ZENITHBANK** with **1.14bn**, and **AIICO** with **1.10bn** units.

SECTORAL PERFORMANCE

| INDEX | CHANGE PRICE | CHANGE PERCENT % |
|------------|--------------|------------------|
| NGX30 | -8.22 | -0.15 |
| NGXBNK | -7.75 | -0.48 |
| NGXCG | -18.91 | -0.45 |
| NGXINDUSTR | 6.04 | 0.11 |
| NGXINS | -133.8 | -8.28 |
| NGXOILGAS | -2.74 | -0.11 |

NGX Market Indices

| | |
|-----------------|-----------------------|
| All Share Index | 145,367.03 |
| Previous ASI | 145,864.80 |
| % Day Change | -0.34% |
| % Weekly Change | -0.27% |
| No. of Deals | 43,366 |
| Volume | 2,455,018,757 |
| Value | 22,210,127,788.91 |
| Market Cap | 91,969,179,287,326.20 |
| 1 Month High | 146,570.71 |
| 1 Month Low | 141,263.05 |

NGX Top Gainers

| Symbols | Daily | Price (₦) |
|-----------|-------|-----------|
| AUSTINLAZ | 0.21 | 2.33 |
| NCR | 0.75 | 8.70 |
| THOMASWY | 0.28 | 3.70 |
| CHAMS | 0.22 | 2.95 |
| RTBRISCOE | 0.22 | 3.96 |

NGX Top Losers

| Symbols | Daily ▼ | Price (₦) |
|-----------|---------|-----------|
| CILEASING | -0.80 | 7.20 |
| SOVRENINS | -0.36 | 3.24 |
| LASACO | -0.50 | 4.50 |
| UPDC | -0.80 | 7.20 |
| WEMABANK | -2.30 | 20.70 |

NGX Top Volume

| Symbols | Price (₦) | Volumes |
|------------|-----------|-------------|
| UNIVINSURE | 1.32 | 390,399,978 |
| AIICO | 4.19 | 236,570,366 |
| LINKASSURE | 2.70 | 214,265,645 |
| MBENEFIT | 3.50 | 157,531,421 |
| REGALINS | 1.51 | 109,853,018 |

NGX Top Value

| Symbols | Price (₦) | Values |
|------------|-----------|------------------|
| NB | 71.50 | 1,865,761,208.90 |
| ELLAHLAKES | 15.90 | 1,772,856,315.92 |
| ACCESSCORP | 27.65 | 1,287,703,203.45 |
| ZENITHBANK | 72.00 | 1,148,148,237.75 |
| AIICO | 4.19 | 1,108,568,348.31 |

CORPORATE ACTION

| COMPANY | DIVIDEND/SHARE | QUALIFICATION DATE | PAYMENT DATE |
|--------------------------|----------------|--------------------|--------------------|
| Custodian Investment Plc | 0.25 | August 15, 2025 | September 9, 2025, |
| PRESCO | 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 **3,591.88**. Furthermore, Market Capitalization closed negatively at **2,149.10trillion**. Market activity measured by aggregate volume decreased to **12,344,792units** while values increased by **925,617,140.30units** in **29** deals.

GLOBAL MARKET INDICES

| MARKET | PREVIOUS CLOSE | TODAY'S CLOSE | %CHANGE |
|----------------|----------------|---------------|---------|
| DJIA | 44,922.27 | 44,827.42 | -0.21% |
| S&P 500 | 6,466.58 | 6,461.88 | -0.07% |
| FTSE 100 INDEX | 9,165.23 | 9,161.26 | -0.04% |
| GERMAN DAX | 24,185.59 | 24,347.03 | 0.67% |
| FRENCH CAC | 9,089.70 | 9,142.28 | 0.58% |
| NIKKEI 225 | 43,274.67 | 42,649.26 | -1.45% |
| NGX (ASI) | 145,864.80 | 145,367.03 | -0.34% |

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 \$) | 66.43 | 65.63 |

| 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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