

Daily Market Report



Tuesday, August 19, 2025

The bears are taken over the market.....as the ASI depreciated by 146bps today

The local bourse (NGX) closed the day on a bearish note as ASI depreciated by **146bps** driven by price depreciation and selling pressure in all sectoral tickers. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **142,613.47**.

Market Capitalization closed negatively at **N90.22trillion**, as investors lost **N1334.29billion**, and Year-to-date (YTD) gain decreased to **38.56%**

What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and selling pressure in **NB (-2.1%)**, **DANGCEM (-9.88%)**, **ACCESSCORP (-0.18%)** and **ZENITHBANK (-7.26%)** offsetting gains in **DANGSUGAR (0.81%)**, **UBA (0.1%)**, **FIDELITYBK (0.97%)** and **WAPCO (0.04%)** which kept the ASI in a negative terrain. Losses 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 negative, closing at **0.66x**, indicating more laggards than advancers. The top gainers include **ENAMELWA (9.95%)**, **DAARCOMM (9.82%)**, **DEAPCAP (9.6%)**, **ACADEMY (8.43%)** and **INTBREW (6.95%)**

Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and selling pressure in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS**. As a result, the year-to-date (YTD) gain decreased to **38.56%**

At the close of today's trade, **ROYALEX (-10%)**, **DANGCEM (-9.88%)**, **RTBRISCOE (-9.87%)**, **JAIZBANK (-9.81%)** and **LASACO (-9.77%)** were among the **39** market laggards as **128** stocks traded today.

Market activity, measured by aggregate volume, decreased by **1.83%**, with aggregate value depreciating by **17.28%**. Investors traded a total of **1.02bn** units of shares valued at **N17.64bn** in **34,206** deals.

The most active stocks by volume were **UNIVINSURE**, which traded **130.22mn** units, followed by **AIICO** with **100.11mn** units, **MBENEFIT** with **68.52mn** units, **PRESTIGE** with **66.86mn**, and **REGALINS** with **46.14mn** units.

The most active stocks by value were **NB**, which traded **2.13bn** units, followed by **DANGCEM** with **1.35bn** units, **ACCESSCORP** with **1.04bn** units, **ZENITHBANK** with **894.06mn**, and **DANGSUGAR** with **765.92mn** units.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-75.48	-1.43
NGXBNK	-32.57	-2.06
NGXCG	-70.29	-1.68
NGXINDUSTR	-237.75	-4.37
NGXINS	-55.04	-3.86
NGXOILGAS	-16.41	-0.68

NGX Market Indices

All Share Index	142,613.47
Previous ASI	144,722.47
% Day Change	1.46%
% Weekly Change	1.39%
No. of Deals	34,206
Volume	1,027,442,956
Value	17,649,088,316.04
Market Cap	90,227,056,308,216.40
1 Month High	146,570.71
1 Month Low	141,263.05

NGX Top Gainers

Symbols	Daily	Price (₦)
ENAMELWA	3.25	35.90
DAARCOMM	0.11	1.23
DEAPCAP	0.17	1.94
ACADEMY	0.70	9.00
INTBREW	0.90	13.85

NGX Top Losers

Symbols	Daily ▼	Price (₦)
ROYALEX	-0.28	2.52
DANGCEM	-57.00	520.00
RTBRISCOE	-0.39	3.56
JAIZBANK	-0.47	4.32
LASACO	-0.39	3.60

NGX Top Volume

Symbols	Price (₦)	Volumes
UNIVINSURE	1.31	130,222,417
AIICO	4.30	100,111,933
MBENEFIT	4.30	68,521,312
PRESTIGE	1.97	66,866,506
REGALINS	1.49	46,141,311

NGX Top Value

Symbols	Price (₦)	Values
NB	70.00	2,133,287,966.70
DANGCEM	520.00	1,350,582,172.60
ACCESSCORP	27.45	1,045,961,591.50
ZENITHBANK	67.05	894,068,077.00
DANGSUGAR	61.90	765,927,676.60

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 positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,589.09**. Furthermore, Market Capitalization closed positively at **N 2,147.43 trillion**. Market activity measured by aggregate volume increased to **56,728,965 units** while values increased by **176,315,631.50** in **33** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	44,948.35	45,132.27	0.41%
S&P 500	6,448.27	6,455.38	0.11%
FTSE 100 INDEX	9,137.55	9,184.17	0.51%
GERMAN DAX	24,269.54	24,424.28	0.64%
FRENCH CAC	9,158.93	9,270.85	1.22%
NIKKEI 225	43,714.31	43,546.29	0.38%
NGX (ASI)	144,722.47	142,613.47	1.46%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.13	3.49
INFLATION (%)	21.88	22.22
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50	27.50
BRENT CRUDE (US \$)	65.93	66.02

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