

Daily Market Report



Friday, Aug 22, 2025

The ASI depreciated by 251bps week on weekup by 48bps today.

The local bourse (NGX) depreciated by **251bps** as a result of profit taking activities and selling pressure during the week, in today's market ASI appreciated by **48bps** driven by price appreciation and increase buying interest in all sectoral tickers except **NGXINDUSTR**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **141,004.14pts**.

Market Capitalization closed positively at **N89.20trillion**, as investors gained **N424.96billion**, and Year-to-date (YtD) gain increased to **37.00%**.

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **NB (2.49%)**, **FCMB (2.33%)**, **GTCO (1.35%)** and **ACCESSCORP (0.19%)** with offsetting losses in **STANBIC (-0.53%)**, **UBA (-0.10%)**, **WAPCO (1.82%)** and **HONYFLOUR (-0.22%)** which kept the ASI in positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBANK**, **NGXCG**, **NGXINS** and **NGXOILGAS**. The market breadth measured by advancers/ decliners was positive, closing at **3.85x**, indicating advancers more than laggards. The top gainers include **BETAGLAS (10%)**, **FTNCOCOA (10%)**, **UPDC (10%)**, **VERITASKAP (10%)** and **SOVRENINS (9.96%)**

Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positive due to price appreciation in **NGX30**, **NGXBANK**, **NGXCG**, **NGXINS** and **NGXOILGAS**. except **NGXINDUSTR** which closed negatively. As a result, the year-to-date (YTD) gain increased to **37.00%**.

At the close of today's trade, **THOMASWY (-9.91%)**, **MCNICHOLS (-7.51%)**, **TIP (-4.43%)**, **ETRANZACT (-3.98%)** and **NPFMCRFBK (-2.81%)** were among the **13** market laggards as **125** stocks traded today.

Market activity, measured by aggregate volume, increased by **33.83%**, with aggregate value appreciating by **96.13%**. Investors traded a total of **767.72mn** units of shares valued at **N25.22bn** in **25,772** deals.

The most active stocks by volume were **FCMB**, which traded **135.96mn** units, followed by **AIICO** with **43.72mn** units, **NB** with **43.25mn** units, **WAPIC** with **33.32mn**, and **TRANSPower** with **29.76mn** units.

The most active stocks by value were **TRANSPower**, which traded **N8.51bn**, followed by **NB** with **N3.02bn**, **GTCO** with **N1.48bn**, **FCMB** with **N1.46bn**, and **STANBIC** with **N1.25bn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	18.90	0.37
NGXBANK	12.71	0.83
NGXCG	28.85	0.71
NGXINDUSTR	-3.88	-0.08
NGXINS	85.57	7.06
NGXOILGAS	1.59	0.07

NGX Market Indices

All Share Index	141,004.14
Previous ASI	140,332.44
% Day Change	0.48%
% Weekly Change	2.51%
No. of Deals	25,772
Volume	767,726,709
Value	25,228,957,229.00
Market Cap	89,208,868,558,611.80
1 Month High	146,570.71
1 Month Low	140,332.44

NGX Top Gainers

Symbols	Daily	Price (₦)
BETAGLAS	40.85	449.35
FTNCOCOA	0.60	6.60
UPDC	0.63	6.93
VERITASKAP	0.18	1.98
SOVRENINS	0.24	2.65

NGX Top Losers

Symbols	Daily ▼	Price (₦)
THOMASWY	-0.33	3.00
MCNICHOLS	-0.26	3.20
TIP	-0.57	12.30
ETRANZACT	-0.45	10.85
NPFMCRFBK	-0.09	3.11

NGX Top Volume

Symbols	Price (₦)	Volumes(unit)
FCMB	11.00	135,960,389
AIICO	4.18	43,727,065
NB	70.00	43,255,425
WAPIC	3.21	33,325,404
TRANSPower	286.50	29,763,628

NGX Top Value

Symbols	Price (₦)	Values (₦)
TRANSPower	286.50	8,517,388,738.00
NB	70.00	3,025,767,408.00
GTCO	94.00	1,488,136,844.00
FCMB	11.00	1,461,982,803.00
STANBIC	94.00	1,253,222,523.00

CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
Custodian Investment Plc	0.25	August 15, 2025	September 9, 2025,
PRESOCO	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 **3,640.80**. Furthermore, Market Capitalization closed negatively at **2,178.37 trillion**. Market activity measured by aggregate volume decreased to **1,468,797 units** with values decreasing by **6,040,627.93 units** in **26 deals**.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	44,749.54	45,675.68	2.07%
S&P 500	6,373.40	6,475.04	1.59%
FTSE 100 INDEX	9,302.55	9,340.75	0.41%
GERMAN DAX	24,279.34	24,372.43	0.38%
FRENCH CAC	9,229.05	9,301.79	0.79%
NIKKEI 225	42,610.17	42,633.29	0.05%
NGX (ASI)	140,332.44	141,004.14	0.48%

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 \$)	67.62	67.17

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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