

# Daily Market Report



Tuesday, September 2, 2025

## The bears are still in control of the market.....as the ASI is down by 70bps today

In today's market, the local bourse (NGX) closed the day on a bearish note as ASI depreciated by **70bps** driven by price depreciation and profit taking in all sectoral tickers except **NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **138,737.64pts**.

Market Capitalization closed negatively at **N87.78trillion**, as investors lost **N622.95billion**, and Year-to-date (YtD) gain decreased to **34.79%**.

### What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **GTCO (-0.54%)**, **ACCESSCORP (-1.34%)**, **UBA (-1.16%)** and **WAPCO (-9.88%)** with offsetting gains in **ZENITHBANK (0.93%)**, **FIDELITYBK (0.711%)**, **OANDO (1.04%)** and **MANSARD (2.44%)** which kept the ASI in negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR** and **NGXINS**. The market breadth measured by advancers/ decliners was negative, closing at **0.23x**, indicating laggards more than advancers. The top gainers include **NCR (9.96%)**, **AUSTINLAZ (9.66%)**, **TANTALIZER (6.09%)**, **MULTIVERSE (5.50%)** and **DEAPCAP (4.68%)**

### Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR** and **NGXINS** except **NGXOILGAS** which closed positively. As a result, the year-to-date (YTD) gain decreased to **34.79%**.

At the close of today's trade, **AIICO (-10%)**, **CONHALLPLC (-10%)**, **PRESTIGE (-10%)**, **WEMABANK (-10%)** and **ELLAHLAKES (-9.93%)** were among the **47** market laggards as **123** stocks traded today.

Market activity, measured by aggregate volume, decreased by **1.24%**, with aggregate value depreciating by **21.69%**. Investors traded a total of **402.83mn** units of shares valued at **N11.56bn** in **31,277** deals.

The most active stocks by volume were **GTCO**, which traded **32.61mn** units, followed by **ACCESSCORP** with **29.77mn** units, **AIICO** with **21.80mn** units, **ELLAHLAKES** with **20.53mn**, and **SOVRENINS** with **20.41mn** units.

The most active stocks by value were **GTCO**, which traded **N3.02bn**, followed by **ZENITHBANK** with **N1.25bn**, **ACCESSCORP** with **N775.27mn**, **UBA** with **N686.91mn**, and **MTNN** with **N396.48mn**.

## SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-34.38	-0.67
NGXBNK	-12.41	-0.82
NGXCG	-22.88	-0.57
NGXINDUSTR	-72.64	-1.47
NGXINS	-28.66	-2.23
NGXOILGAS	2.28	0.10

## NGX Market Indices

All Share Index	138,737.64
Previous ASI	139,722.19
% Day Change	0.70%
% Weekly Change	1.11%
No. of Deals	31,277
Volume	402,837,330
Value	11,567,324,793.81
Market Cap	87,783,573,977,740.00
1 Month High	146,570.71
1 Month Low	138,737.64

## NGX Top Gainers

Symbols	Daily	Price (₦)
NCR	1.15	12.70
AUSTINLAZ	0.28	3.18
TANTALIZER	0.14	2.44
MULTIVERSE	0.60	11.50
DEAPCAP	0.08	1.79

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
AIICO	-0.38	3.42
CONHALLPLC	-0.43	3.87
PRESTIGE	-0.18	1.62
WEMABANK	-2.30	20.70
ELLAHLAKES	-1.26	11.43

## NGX Top Volume

Symbols	Price (₦)	Volumes(unit)
GTCO	91.50	32,612,455
ACCESSCORP	25.85	29,779,933
AIICO	3.42	21,806,619
ELLAHLAKES	11.43	20,535,733
SOVRENINS	2.85	20,414,200

## NGX Top Value

Symbols	Price (₦)	Values (₦)
GTCO	91.50	3,023,182,067.45
ZENITHBANK	65.00	1,253,818,445.25
ACCESSCORP	25.85	775,274,344.75
UBA	46.70	686,914,004.00
MTNN	435.00	396,481,997.30

CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
Learn Africa Plc	0.35	September 12, 2025	September 25 2025
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 **3,604.70**. Furthermore, Market Capitalization closed negatively at **2,156.77 trillion**. Market activity measured by aggregate volume decreased to **3,134,620 units** with values decreasing by **9,182,623.04 units** in **16 deals**.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY’S CLOSE	%CHANGE
DJIA	45,544.88	44,996.69	-1.20%
S&P 500	6,460.26	6,384.70	-1.17%
FTSE 100 INDEX	9,196.34	9,130.35	-0.72%
GERMAN DAX	24,023.06	23,632.34	-1.63%
FRENCH CAC	9,011.57	8,946.30	-0.72%
NIKKEI 225	42,188.79	42,335.50	0.35%
NGX (ASI)	139,722.19	138,737.64	0.70%

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 \$)	68.31	67.12

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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