

Daily Market Report



Wednesday, September 3, 2025

The bears are still in control of the September.....as the ASI depreciated by 42bps

The local bourse (NGX) decreased by **42bps** driven by price depreciation and profit taking in all sectoral tickers except **NGXINDUSTR**. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **138,159.25**.

Market Capitalization closed negatively at **N87.41trillion**, as investors lost **N365.96billion**, and Year-to-date (YtD) gain decreased to **34.23%**

What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **ARADEL (-0.45%)**, **GTCO (-1.09%)**, **UBA (-2.03%)** and **ZENITHBANK (-1.15%)** offsetting gains in **WAPCO (1.94%)**, **ELLAHLAKES (3.24%)**, **CADBURY (5.45%)** and **FCMB (5%)** which kept the ASI in a negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS**, **NGXOILGAS**. The market breadth measured by advancers/ decliners was negative closing at **0.31x**, indicating more laggards than advancers. The top gainers include **NSLTECH (9.09%)**, **CONHALLPLC (8.53%)**, **JOHNHOLT (7.94%)**, **CADBURY (5.45%)** and **WEMABANK (5.31%)**.

Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and profit taken in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS**, **NGXOILGAS** except **NGXINDUSTR** which closed positively. As a result, the year-to-date (YTD) gain decreased to **34.23%**.

At the close of today's trade, **DAARCOMM (-10%)**, **LEARNAFRCA (-10%)**, **LEGENDINT (-10%)**, **MANSARD (-9.95%)** and **UNIVINSURE (-9.6%)** were among the **44** market laggards as **125** stocks traded today.

Market activity, measured by aggregate volume, increased by **19.84%**, with aggregate value appreciating by **70.03%**. Investors traded a total of **482.74mn** units of shares valued at **N19.66bn** in **28,051** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **43.03mn** units, followed by **FIDELITYBK** with **40.12mn** units, **GTCO** with **34.84mn** units, **UBA** with **33.42mn**, and **AIICO** with **29.07mn** units.

The most active stocks by value were **ARADEL**, which traded N6.45bn, followed by **GTCO** with **N3.15bn**, **UBA** with **N1.53bn**, **ZENITHBANK** with **N1.16bn**, and **ACCESSCORP** with **N1.1bn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-16.95	-0.33
NGXBNK	-8.30	-0.55
NGXCG	-36.21	-0.90
NGXINDUSTR	11.17	0.23
NGXINS	-55.99	-4.46
NGXOILGAS	-10.50	-0.44

NGX Market Indices

All Share Index	138,159.25
Previous ASI	138,737.64
% Day Change	0.42%
% Weekly Change	1.52%
No. of Deals	28,051
Volume	482,741,310
Value	19,667,405,678.57
Market Cap	87,417,611,602,887.00
1 Month High	140,295.50
1 Month Low	138,159.25

NGX Top Gainers

Symbols	Daily	Price (₦)
NSLTECH	0.08	0.96
CONHALLPLC	0.33	4.20
JOHNHOLT	0.50	6.80
CADBURY	3.00	58.00
WEMABANK	1.10	21.80

NGX Top Losers

Symbols	Daily ▼	Price (₦)
DAARCOMM	-0.1	0.9
LEARNAFRCA	-0.78	7.02
LEGENDINT	-0.53	4.77
MANSARD	-1.59	14.39
UNIVINSURE	-0.12	1.13

NGX Top Volume

Symbols	Price (₦)	Volumes
ACCESSCORP	25.60	43,033,160
FIDELITYBK	21.05	40,128,769
GTCO	90.50	34,846,233
UBA	45.75	33,429,744
AIICO	3.18	29,079,333

NGX Top Value

Symbols	Price (₦)	Values (₦)
ARADEL	511.20	6,457,630,333.80
GTCO	90.50	3,157,985,714.50
UBA	45.75	1,535,452,511.90
ZENITHBANK	64.25	1,169,069,768.35
ACCESSCORP	25.60	1,101,305,864.35

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 **3,581.40** Furthermore, Market Capitalization closed negatively at **N2,142.83** Market activity measured by aggregate volume decreased to **1,460,027** units with values decreasing to **4,318,006.74** in **19** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY’S CLOSE	%CHANGE
DJIA	44,996.69	45,030.24	0.07%
S&P 500	6,384.70	6,421.22	0.57%
FTSE 100 INDEX	9,130.35	9,177.99	0.52%
GERMAN DAX	23,632.34	23,600.53	0.13%
FRENCH CAC	8,946.30	9,013.44	0.75%
NIKKEI 225	42,335.50	41,938.89	0.94%
NGX (ASI)	138,737.64	138,159.25	0.42%

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 \$)	67.12	66.46

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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