

Daily Market Report



Thursday, September 4, 2025

The ASI is down by 94bps marking the fourth weekly decline.....up by 60bps today

The All Share index closed the first week of September on a bearish note down by 94bps marking the fourth weekly decline. In today's market, the local bourse (NGX) closed the day on a bullish note as ASI appreciated by **60bps** driven by price appreciation and increase buying interest in all sectoral tickers. As a result, the benchmark All Share Index (ASI) closed positively to settle at **138,980.01pts**.

Market Capitalization closed positively at **N87.93trillion**, as investors gained **N520.64billion**, and Year-to-date (YtD) gain increased to **35.03%**.

What shaped today's market direction

The gain in today's market can majorly be attributed to price appreciation and increase buying interest in **SOVRENINS (4.21%)**, **NB (3.79%)**, **ZENITHBANK (1.01%)** and **UBA (2.19%)** with offsetting losses in **FIDELITYBK (-0.24%)**, **UCAP (-3.21%)**, **STERLINGNG (-0.66%)** and **CHAMPION (-4.15%)** which kept the ASI in positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks. The market breadth measured by advancers/ decliners was positive, closing at **3.58x**, indicating advancers more than laggards. The top gainers include **ELLAHLAKES (10%)**, **VERITASKAP (10%)**, **HONYFLOUR (9.95%)**, **MANSARD (9.94%)** and **ROYALEX (9.94%)**

Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to price appreciation in all sectoral tickers. As a result, the year-to-date (YTD) gain increased to **35.03%**.

At the close of today's trade, **AUSTINLAZ (-9.75%)**, **NEIMETH (-8.33%)**, **DAARCOMM (-4.44%)**, **CHAMPION (-4.15%)** and **UNILEVER (-4.11%)** were among the **12** market laggards as **124** stocks traded today.

Market activity, measured by aggregate volume, increased by **276.80%**, while aggregate value depreciated by **18.73%**. Investors traded a total of **1.81bn** units of shares valued at **N15.98bn** in **24,483** deals.

The most active stocks by volume were **SOVRENINS**, which traded **1.41bn** units, followed by **NB** with **41.20mn** units, **FIDELITYBK** with **30.55mn** units, **ZENITHBANK** with **26.35mn**, and **UNIVINSURE** with **24.15mn** units.

The most active stocks by value were **SOVRENINS**, which traded **N4.21bn**, followed by **NB** with **N2.82bn**, **ZENITHBANK** with **N1.70bn**, **MTNN** with **N864.09mn**, and **FIDELITYBK** with **N642.12mn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	31.28	0.62
NGXBNK	14.61	0.98
NGXCG	35.00	0.88
NGXINDUSTR	0.08	0.00
NGXINS	80.70	6.73
NGXOILGAS	0.68	0.03

NGX Market Indices

All Share Index	138,980.01
Previous ASI	138,157.16
% Day Change	0.60%
% Weekly Change	0.94%
No. of Deals	24,483
Volume	1,818,985,821
Value	15,983,504,256.75
Market Cap	87,936,930,816,970.40
1 Month High	146,570.71
1 Month Low	138,157.16

NGX Top Gainers

Symbols	Daily	Price (₦)
ELLAHLAKES	1.18	12.98
VERITASKAP	0.18	1.98
HONYFLOUR	2.10	23.20
MANSARD	1.43	15.82
ROYALEX	0.17	1.88

NGX Top Losers

Symbols	Daily ▼	Price (₦)
AUSTINLAZ	-0.31	2.87
NEIMETH	-0.55	6.05
DAARCOMM	-0.04	0.86
CHAMPION	-0.65	15.00
UNILEVER	-3.00	70.00

NGX Top Volume

Symbols	Price (₦)	Volumes(unit)
SOVRENINS	2.97	1,416,633,778
NB	68.50	41,203,061
FIDELITYBK	21.00	30,556,060
ZENITHBANK	64.90	26,351,035
UNIVINSURE	1.20	24,154,245

NGX Top Value

Symbols	Price (₦)	Values (₦)
SOVRENINS	2.97	4,214,278,367.87
NB	68.50	2,821,560,159.40
ZENITHBANK	64.90	1,704,144,643.55
MTNN	435.00	864,094,313.00
FIDELITYBK	21.00	642,120,505.40

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 **3,565.46**. Furthermore, Market Capitalization closed negatively at **2,133.29trillion**. Market activity measured by aggregate volume increased to **1,984,08 units** with values decreasing by **42,500,819.56units** in **26** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY’S CLOSE	%CHANGE
DJIA	45,030.24	45,395.44	0.81%
S&P 500	6,421.22	6,466.18	0.70%
FTSE 100 INDEX	9,177.99	9,217.05	0.43%
GERMAN DAX	23,600.53	23,784.14	0.78%
FRENCH CAC	9,013.44	8,986.17	0.30%
NIKKEI 225	41,938.89	42,580.27	1.53%
NGX (ASI)	138,157.16	138,980.01	0.60%

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 \$)	67.05	68.31

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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