

# Daily Market Report



Tuesday, September 9, 2025

The month of September prints a new high.....the ASI appreciated by 29bps today

The bulls are getting back to the market as the ASI appreciated by **29bps** driven by price appreciation and increase buying interest in all sectoral tickers except **NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **139,796.11**.

Market Capitalization closed positively at **N88.45trillion**, as investors gained **N253.95billion**, and Year-to-date (YtD) gain increased to **35.82%**

## What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **FCMB (2.38%)**, **GTCO (0.54%)**, **ACCESSCORP (0.78%)** and **ZENITHBANK (0.38%)** offsetting losses in **ELLAHLAKES (-8.76%)**, **OANDO (-0.53%)**, **TRANSCORP (-0.11%)** and **NGXGROUP (-1.17%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**. The market breadth measured by advancers/ decliners was positive closing at **1.89x**, indicating more advancers than laggards. The top gainers include **REGALINS (10%)**, **MECURE (9.92%)**, **ETRANZACT (9.73%)**, **DAARCOMM (9.57%)** and **DEAPCAP (9.52%)**.

## Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increased buying interest in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS** except **NGXOILGAS** which closed negatively. As a result, the year-to-date (YTD) gain increased to **35.82%**.

At the close of today's trade, **UNILEVER (-9.79%)**, **FTNCOCOA (-9.4%)**, **ELLAHLAKES (-8.76%)**, **LINKASSURE (-6.85%)** and **BERGER (-6.33%)** were among the **19** market laggards as **126** stocks traded today.

Market activity, measured by aggregate volume, decreased by **30.45%**, with aggregate value depreciating by **30.41%**. Investors traded a total of **659.16mn** units of shares valued at **N12.50bn** in **25,192** deals.

The most active stocks by volume were **FCMB**, which traded **202.48mn** units, followed by **UNIVINSURE** with **63.14mn** units, **FIRSTHOLDCO** with **44.22mn** units, **REGALINS** with **30.98mn**, and **ACCESSCORP** with **26.12mn** units.

The most active stocks by value were **FCMB**, which traded **N2.09bn** units, followed by **GTCO** with **N1.5bn**, **FIRSTHOLDCO** with **N1.33bn**, **MTNN** with **N800.11mn**, and **ACCESSCORP** with **N676.41mn**.

## SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	16.51	0.32
NGXBNK	6.46	0.43
NGXCG	14.49	0.36
NGXINDUSTR	41.33	0.85
NGXINS	12.87	0.98
NGXOILGAS	-1.14	-0.05

## NGX Market Indices

All Share Index	139,796.11
Previous ASI	139,394.75
% Day Change	0.29%
% Weekly Change	0.59%
No. of Deals	25,192
Volume	659,161,942
Value	12,504,967,407.02
Market Cap	88,453,288,104,793.50
1 Month High	139,796.11
1 Month Low	138,157.16

## NGX Top Gainers

Symbols	Daily	Price (₦)
REGALINS	0.13	1.43
MECURE	1.95	21.60
ETRANZACT	1.10	12.40
DAARCOMM	0.09	1.03
DEAPCAP	0.16	1.84

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
UNILEVER	6.85	63.15
FTNCOCOA	0.56	5.40
ELLAHLAKES	1.25	13.02
LINKASSURE	0.15	2.04
BERGER	2.40	35.50

## NGX Top Volume

Symbols	Price (₦)	Volumes
FCMB	10.75	202,488,429
UNIVINSURE	1.25	63,140,207
FIRSTHOLDCO	30.50	44,226,523
REGALINS	1.43	30,981,704
ACCESSCORP	25.90	26,124,843

## NGX Top Value

Symbols	Price (₦)	Values (₦)
FCMB	10.75	2,097,364,760.10
GTCO	92.50	1,503,146,773.55
FIRSTHOLDCO	30.50	1,338,648,390.65
MTNN	435.00	800,110,131.70
ACCESSCORP	25.90	676,419,389.60

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 **3,576.35** Furthermore, Market Capitalization closed positively at **N2,139.81** Market activity measured by aggregate volume decreased to **54,522** units with values decreasing to **2,727,313.74** in **12** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY’S CLOSE	%CHANGE
DJIA	45,474.97	45,526.44	0.11%
S&P 500	6,504.88	6,505.39	0.01%
FTSE 100 INDEX	9,216.61	9,237.11	0.22%
GERMAN DAX	23,796.81	23,649.20	0.62%
FRENCH CAC	8,990.47	9,046.13	0.62%
NIKKEI 225	43,643.81	43,459.29	0.42%
NGX (ASI)	139,394.75	139,796.11	0.29%

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 \$)	66.93	66.57

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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