

Daily Market Report



Friday, September 12, 2025

ASI closed the week on a bullish note up 113bps..... down by 9bps for the day

The local bourse (NGX) appreciated by **113bps** as a result of price appreciation and increase buying interest during the week, in today's market, ASI depreciated by **9bps** driven by price depreciation and profit taking in all sectoral tickers except **NGXBNK**, **NGXCG**, and **NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **140,545.69pts**.

Market Capitalization closed negatively at **N88.92trillion**, as investors lost **N76.02billion**, and Year-to-date (YtD) gain decreased to **36.55%**.

What shaped today's market direction

The losses in today's market can majorly be attributed to price depreciation and profit taking in **DANGCEM (-3.18%)**, **NGXGROUP (-3.30%)**, **UCAP (-3.08%)** and **PZ (-3.33%)** with offsetting gains in **ARADEL (2.79%)**, **ACCESSCORP (1.32%)**, **ZENITHBANK (1.49%)** and **FIDELITYBK (1.94%)** which kept the ASI in negative terrain. losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXINDUSTR**, and **NGXINS**. The market breadth measured by advancers/ decliners was positive, closing at **1.48x**, indicating advancers more than laggards. The top gainers include **ETRANZACT (9.93%)**, **REGALINS (9.93%)**, **CHELLARAM (9.92%)**, **IMG (9.91%)** and **JOHNHOLT (9.56%)**

Sectoral performance was flat

Sectoral performance was flat. Some of our observed indices closed negatively due to price depreciation in **NGX30**, **NGXINDUSTR**, and **NGXINS** while **NGXBNK**, **NGXCG**, and **NGXOILGAS** closed positively. As a result, the year-to-date (YTD) gain decreased to **36.55%**.

At the close of today's trade, **MBENEFIT (-7.80%)**, **LASACO (-5.97%)**, **DAARCOMM (-4.50%)**, **PZ (-3.33%)** and **NGXGROUP (-3.30%)** were among the 21 market laggards as **122** stocks traded today.

Market activity, measured by aggregate volume, increased by **14.96%**, with aggregate value appreciating by **30.28%**. Investors traded a total of **434.69mn** units of shares valued at **N16.16bn** in **23,560** deals.

The most active stocks by volume were **NSLTECH**, which traded **71.43mn** units, followed by **ACCESSCORP** with **40.95mn** units, **STERLINGNG** with **37.14mn** units, **REGALINS** with **20.14mn**, and **CHAMS** with **19.37mn** units.

The most active stocks by value were **ARADEL**, which traded **N8.78bn**, followed by **ACCESSCORP** with **N1.09bn**, **ZENITHBANK** with **N1.07bn**, **DANGCEM** with **N535.63mn**, and **FIDELITYBK** with **N398.92mn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-5.95	-0.12
NGXBNK	14.75	0.97
NGXCG	24.56	0.61
NGXINDUSTR	-69.32	-1.39
NGXINS	-8.11	-0.62
NGXOILGAS	23.59	0.98

NGX Market Indices

All Share Index	140,545.69
Previous ASI	140,665.85
% Day Change	0.09%
% Weekly Change	1.13%
No. of Deals	23,560
Volume	434,699,397
Value	16,163,567,628.37
Market Cap	88,927,568,845,675.90
1 Month High	140,665.85
1 Month Low	138,157.16

NGX Top Gainers

Symbols	Daily	Price (₦)
ETRANZACT	1.35	14.95
REGALINS	0.15	1.66
CHELLARAM	1.20	13.30
IMG	3.30	36.60
JOHNHOLT	0.65	7.45

NGX Top Losers

Symbols	Daily ▼	Price (₦)
MBENEFIT	0.33	3.90
LASACO	0.19	2.99
DAARCOMM	0.05	1.06
PZ	1.20	34.85
NGXGROUP	2.05	60.15

NGX Top Volume

Symbols	Price (₦)	Volumes(unit)
NSLTECH	0.86	71,438,152
ACCESSCORP	26.80	40,955,473
STERLINGNG	7.90	37,146,718
REGALINS	1.66	20,149,473
CHAMS	3.25	19,378,610

NGX Top Value

Symbols	Price (₦)	Values (₦)
ARADEL	545.00	8,786,333,936.80
ACCESSCORP	26.80	1,095,879,494.30
ZENITHBANK	68.00	1,077,609,900.40
DANGCEM	511.20	535,633,092.80
FIDELITYBK	21.05	398,923,047.10

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 **3,573.54**. Furthermore, Market Capitalization closed negatively at **2,138.13trillion**. Market activity measured by aggregate volume increased to **1,631,860 units** with values increasing by **3,393,545.62 units** in **24** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY’S CLOSE	%CHANGE
DJIA	46,033.44	46,108.00	0.16%
S&P 500	6,585.62	6,587.47	0.03%
FTSE 100 INDEX	9,291.55	9,325.35	0.36%
GERMAN DAX	23,684.33	23,675.38	0.04%
FRENCH CAC	9,089.47	9,100.45	0.12%
NIKKEI 225	44,372.50	44,768.12	0.89%
NGX (ASI)	140,665.85	140,545.69	0.09%

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 \$)	67.68	66.43

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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