

# Daily Market Report



Thursday, September 18, 2025

## The bulls are in control of the market..... ASI appreciated by 16bps for the day

In today's market, the local bourse (NGX) closed the day on a bullish note as ASI appreciated by **16bps** driven by price appreciation and increased buying interest in all sectoral tickers except **NGXBNK** and **NGXINS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **142,263.12**.

Market Capitalization closed positively at **N90.00trillion**, as investors gained **N143.53billion**, and Year-to-date (YtD) gain increased to **38.22%**.

### What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **ARADEL (0.86%)**, **FIDELITYBK (0.24%)**, **GTCO (0.74%)** and **NB (1.71%)** with offsetting losses in **ZENITHBANK (-1.42%)**, **ACCESSCORP (-0.37%)**, **FIRSTHOLDCO (-1.08%)** and **TIP (-7.48%)** which kept the ASI in positive terrain. gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXCG**, **NGXINDUSTR**, and **NGXOILGAS**. The market breadth measured by advancers/decliners was positive, closing at **1.50x**, indicating advancers more than laggards. The top gainers include **GUINNESS (10%)**, **EUNISELL (9.89%)**, **REGALINS (9.82%)**, **THOMASWY (9.80%)** and **MCNICHOLS (9.58%)**

### Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to price appreciation in **NGX30**, **NGXCG**, **NGXINDUSTR**, and **NGXOILGAS** While **NGXBNK** and **NGXINS** closed negatively. As a result, the year-to-date (YTD) gain increased to **38.22%**.

At the close of today's trade, **CONHALLPLC (-7.59%)**, **TIP (-7.48%)**, **SOVRENINS (-6.21%)**, **OMATEK (-5.17%)** and **WAPIC (-4.19%)** were among the **20** market laggards as **125** stocks traded today.

Market activity, measured by aggregate volume, decreased by **67.64%**, with aggregate value depreciating by **65.88%**. Investors traded a total of **325.09mn** units of shares valued at **N8.41bn** in **22,646** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **37.24mn** units, followed by **ZENITHBANK** with **24.26mn** units, **FIDELITYBK** with **20.51mn** units, **NSLTECH** with **19.79mn**, and **VERITASKAP** with **14.90mn** units.

The most active stocks by value were **ZENITHBANK**, which traded **N1.60bn**, followed by **ARADEL** with **N1.10bn**, **ACCESSCORP** with **N1.00bn**, **UBA** with **N528.42mn**, and **FIDELITYBK** with **N426.00mn**.

### SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	5.65	0.11
NGXBNK	-3.54	-0.23
NGXCG	4.67	0.11
NGXINDUSTR	0.27	0.01
NGXINS	-13.65	-1.07
NGXOILGAS	6.83	0.28

## NGX Market Indices

All Share Index	142,263.12
Previous ASI	142,036.25
% Day Change	0.16%
% Weekly Change	1.22%
No. of Deals	22,646
Volume	325,096,275
Value	8,412,826,648.27
Market Cap	90,008,750,187,331.50
1 Month High	141,659.00
1 Month Low	138,157.16

## NGX Top Gainers

Symbols	Daily	Price (₦)
GUINNESS	16.00	176.00
EUNISELL	2.75	30.55
REGALINS	0.16	1.79
THOMASWY	0.24	2.69
MCNICHOLS	0.34	3.89

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
CONHALLPLC	0.33	4.02
TIP	0.97	12.00
SOVRENINS	0.19	2.87
OMATEK	0.06	1.10
WAPIC	0.14	3.20

## NGX Top Volume

Symbols	Price (₦)	Volumes(unit)
ACCESSCORP	27.00	37,243,559
ZENITHBANK	66.00	24,269,881
FIDELITYBK	20.75	20,511,693
NSLTECH	0.82	19,799,348
VERITASKAP	2.22	14,906,988

## NGX Top Value

Symbols	Price (₦)	Values (₦)
ZENITHBANK	66.00	1,604,310,806.65
ARADEL	588.00	1,103,793,259.50
ACCESSCORP	27.00	1,008,296,415.10
UBA	47.00	528,423,630.10
FIDELITYBK	20.75	426,008,221.05

## CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
UBA PLC	0.25	October 3, 2025	October 10, 2025
ZENITH BANK PLC	1.25	October 3, 2025	October 10, 2025
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 positively after today's trading activities, as the Unlisted Securities Index (NSI) closed **3,545.92**. Furthermore, Market Capitalization closed positively at **2,121.60trillion**. Market activity measured by aggregate volume decreased to **78,871 units** with values decreasing by **666,213.95 units** in **27 deals**.

## GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	45,981.11	46,120.28	0.30%
S&P 500	6,599.26	6,637.63	0.58%
FTSE 100 INDEX	9,208.37	9,222.32	0.15%
GERMAN DAX	23,346.95	23,622.89	1.18%
FRENCH CAC	9,099.36	9,174.70	0.83%
NIKKEI 225	44,790.38	45,303.43	1.15%
NGX (ASI)	142,036.25	142263.12	0.16%

## MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.13	3.49
INFLATION (%)	20.12	21.88
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50	27.50
BRENT CRUDE (US \$)	67.74	67.68

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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