

Daily Market Report



Tuesday, October 7, 2025

The market closed on a bullish note.....as the ASI appreciated by 12bps for the day

The local bourse (NGX) increased by **12bps** driven by price appreciation and increased buying interest in **NGX30**, **NGXINDUSTR**, **NGXINS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **144,995.26**.

Market Capitalization closed positively at **N92.03trillion**, as investors gained **N109.47billion**, and Year-to-date (YtD) gain increased to **40.87%**.

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **DANGCEM (0.93%)**, **WAPCO (1.98%)**, **MTNN (2.27%)** and **UBA (0.71%)** offsetting losses in **ARADEL (-1.59%)**, **ELLAHLAKES (-0.74%)**, **GTCO (-4.04%)** and **ZENITHBANK (-0.58%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXINDUSTR**, **NGXINS**. The market breadth measured by advancers/ decliners was positive, closing at **1.18x**, indicating more advancers than laggards. The top gainers include **CORNERST (9.92%)**, **CONHALLPLC (9.52%)**, **CHAMS (9.22%)**, **VFDGROUP (9.17%)** and **INTENEGINS (8.82%)**.

Sectoral performance was mixed

Sectoral performance was mixed. Some of our observed indices closed positively due to increased buying interest in **NGX30**, **NGXINDUSTR**, **NGXINS** while **NGXBNK**, **NGXCG**, **NGXOILGAS** closed negatively. As a result, the year-to-date (YTD) gain increased to **40.87%**.

At the close of today's trade **LIVINGTRUST (-10%)**, **AUSTINLAZ (-9.74%)**, **LIVESTOCK (-7.5%)**, **TANTALIZER (-6.45%)** and **FTNCOCOA (-5.81%)** were among the **33** market laggards as **126** stocks traded today.

Market activity measured by aggregate volume decreased by **2.43%**, while aggregate value depreciating by **67.05%**. Investors traded a total of **507.28mn** units of shares valued at **N24.28bn** in **30,531** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **45.86mn**, followed by **ELLAHLAKES** with **39.48mn** units, **CHAMS** with **30.82mn** units, **SOVRENINS** with **27.78mn**, and **ARADEL** with **22.57mn** units.

The most active stocks by value were **ARADEL**, which traded **N13.15bn**, followed by **DANGCEM** with **N1.57bn**, **ACCESSCORP** with **N1.19bn**, **WAPCO** with **N644.65mn**, and **ELLAHLAKES** with **N594.31mn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	7.24	0.14
NGXBNK	-20.47	-1.33
NGXCG	-22.39	-0.54
NGXINDUSTR	35.25	0.69
NGXINS	24.71	1.98
NGXOILGAS	-23.29	-0.87

NGX Market Indices

All Share Index	144,995.26
Previous ASI	144,822.78
% Day Change	0.12%
% Weekly Change	0.98%
No. of Deals	30,531
Volume	507,283,635
Value	24,282,221,308.77
Market Cap	92,031,067,594,087.00
1 Month High	144,995.26
1 Month Low	142,979.45

NGX Top Gainers

Symbols	Daily	Price (₦)
CORNERST	0.60	6.65
CONHALLPLC	0.38	4.37
CHAMS	0.39	4.62
VFDGROUP	1.00	11.90
INTENEGINS	0.24	2.96

NGX Top Losers

Symbols	Daily ▼	Price (₦)
LIVINGTRUST	0.66	5.94
AUSTINLAZ	0.34	3.15
LIVESTOCK	0.60	7.40
TANTALIZER	0.16	2.32
FTNCOCOA	0.34	5.51

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
ACCESSCORP	26.00	45,861,491
ELLAHLAKES	14.70	39,488,359
CHAMS	4.62	30,820,530
SOVRENINS	3.09	27,789,686
ARADEL	620.00	22,576,205

NGX Top Value

Symbols	Price (₦)	Values (₦)
ARADEL	620.00	13,158,857,504.40
DANGCEM	530.00	1,573,668,435.40
ACCESSCORP	26.00	1,197,800,925.10
WAPCO	129.00	644,659,739.75
ELLAHLAKES	14.70	594,310,061.56

CORPORATE ACTION

COMPANY	INTERIM DIVIDEND/ SHARE	QUALIFICATION DATE	PAYMENT DATE
GTCO	1.00	October 7, 2025	October 15, 2025
STANBIC IBTC	2.50	October 6, 2025	October 21, 2025
United Bank for Africa	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 at **3,472.90**. Furthermore, Market Capitalization closed negatively at **N2,077.91bn** Market activity measured by aggregate volume decreased to **2,131,141** units with values decreasing by **4,047,427.73** in **8** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	46,644.38	46,683.57	0.08%
S&P 500	6,730.56	6,743.03	0.19%
FTSE 100 INDEX	9,483.45	9,484.29	0.01%
GERMAN DAX	24,439.17	24,429.65	0.04%
FRENCH CAC	9,297.57	9,329.79	0.35%
NIKKEI 225	47,944.76	47,950.88	0.01%
NGX (ASI)	144,822.61	144,995.26	0.12%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	4.23	3.48
INFLATION (%)	20.12	21.88
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.00	27.50
BRENT CRUDE (US \$)	65.33	64.60

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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