

Daily Market Report



Monday, October 13, 2025

ASI starts the week on a positive trajectory.....up by 50bps for the day

The Nigeria All Share Index (ASI) starts the week on a positive trajectory, in today's market, the local bourse (NGX) closed the day on a bullish note as ASI appreciated by **50bps** driven by price appreciation and buying interest in all sectoral tickers except **NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **147,713.69pts**.

Market Capitalization closed positively at **N93.75trillion**, as investors gained **N460.58billion**, and Year-to-date (YtD) gain increased to **43.51%**.

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **CONHALLPLC (7.14%)**, **DANGCEM (1.74%)**, **TRANSPOWER (8.92%)** and **FIRSTHOLDCO (1.61%)** offsetting losses in **ZENITHBANK (-0.73%)**, **GTCO (-1.05%)**, **FIDELITYBK (-1.23%)** and **WAPCO (-0.73%)** 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**, and **NGXINS**. The market breadth measured by advancers/decliners was positive, closing at **1.04x**, indicating more advancers than laggards. The top gainers include **SOVRENINS (9.97%)**, **REGALINS (9.68%)**, **TRANSPOWER (8.92%)**, **CONHALLPLC (7.14%)** and **HMCALL (6.80%)**.

Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increased buying interest in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, and **NGXINS** except **NGXOILGAS** which closed negatively. As a result, the year-to-date (YTD) gain increased to **43.51%**.

At the close of today's trade **TRIPPLEG (-9.92%)**, **WEMABANK (-4.51%)**, **LIVINGTRUST (-3.85%)**, **NGXGROUP (-3.33%)** and **CUTIX (-3.08%)** were among the **24** market laggards as **128** stocks traded today.

Market activity measured by aggregate volume increased by **62.01%**, with aggregate value appreciating by **28.89%**. Investors traded a total of **624.57mn** units of shares valued at **N13.46bn** in **31,411** deals.

The most active stocks by volume were **CONHALLPLC**, which traded **210.46mn**, followed by **FIDELITYBK** with **47.46mn** units, **CHAMS** with **43.96mn** units, **UNIVINSURE** with **29.90mn**, and **SOVRENINS** with **23.25mn** units.

The most active stocks by value were **MTNN**, which traded **N2.61bn**, followed by **ZENITHBANK** with **N1.43bn**, **GTCO** with **N1.03bn**, **FIDELITYBK** with **N951.81mn**, and **CONHALLPLC** with **N909.64mn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	27.05	0.50
NGXBNK	2.48	0.16
NGXCG	5.23	0.13
NGXINDUSTR	35.15	0.66
NGXINS	26.57	2.11
NGXOILGAS	-0.75	-0.03

NGX Market Indices

All Share Index	147,713.69
Previous ASI	146,988.04
% Day Change	0.50%
% Weekly Change	0.50%
No. of Deals	31,411
Volume	624,575,230
Value	13,466,428,638.18
Market Cap	93,756,468,447,257.50
1 Month High	147,713.69
1 Month Low	142,979.45

NGX Top Gainers

Symbols	Daily	Price (₦)
SOVRENINS	0.32	3.53
REGALINS	0.12	1.36
TRANSPOWER	28.00	342.00
CONHALLPLC	0.30	4.50
HMCALL	0.28	4.40

NGX Top Losers

Symbols	Daily ▼	Price (₦)
TRIPPLEG	0.60	5.45
WEMABANK	0.90	19.05
LIVINGTRUST	0.20	5.00
NGXGROUP	2.00	58.00
CUTIX	0.12	3.78

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
CONHALLPLC	4.50	210,461,558
FIDELITYBK	20.05	47,465,203
CHAMS	4.18	43,961,090
UNIVINSURE	1.11	29,903,421
SOVRENINS	3.53	23,259,918

NGX Top Value

Symbols	Price (₦)	Values (₦)
MTNN	471.00	2,618,050,952.30
ZENITHBANK	68.00	1,439,621,754.90
GTCO	94.00	1,039,861,264.05
FIDELITYBK	20.05	951,815,017.60
CONHALLPLC	4.50	909,648,075.07

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 negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,451.40**. Furthermore, Market Capitalization closed negatively at **N 2,065.05bn** Market activity measured by aggregate volume increased by **2,302,579** units with values increasing to **357,324,246.65** in **26** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	45,479.60	45,870.86	0.86%
S&P 500	6,550.88	6,636.03	1.30%
FTSE 100 INDEX	9,427.47	9,437.55	0.11%
GERMAN DAX	24,241.46	24,347.57	0.44%
FRENCH CAC	9,237.48	9,231.50	0.06%
NIKKEI 225	48,088.80	48,088.80	0.00%
NGX (ASI)	146,988.04	147,713.69	0.50%

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 \$)	63.58	62.71

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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