

# Daily Market Report



Friday, November 07, 2025

## ASI closed the week on a bearish note by 299bps..... down by 33bps for the day

The local bourse (NGX) closed the week on a bearish note, by **229bps** as a result of selling pressures during the week. In today's market, ASI depreciated by **33bps**, driven by price depreciation and selling pressures in all sectoral tickers. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **149,524.81pts**.

Market Capitalization closed negatively at **N94.99trillion**, as investors lost **N318.77billion**, and Year-to-date (YtD) gain decreased to **45.27%**.

### What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **WEMABANK (-2.08%)**, **GTCO (-0.58%)**, **UBA (-2.44%)** and **WAPCO (-0.76%)** offsetting gains in **GUINNESS (3.94%)**, **ZENITHBANK (0.17%)**, **CONHALLPLC (4.16%)** and **ELLAHLAKES (8.29%)** which kept the ASI in a negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, **NGXOILGAS**. The market breadth measured by advancers/ decliners was negative closing at **0.47x**, indicating more laggards than advancers. The top gainers include **NCR (9.94%)**, **MCNICHOLS (9.82%)**, **EUNISELL (9.24%)**, **DEAPCAP (8.81%)** and **ELLAHLAKES (8.29%)**.

### Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, and **NGXOILGAS**. As a result, the year-to-date (YTD) gain decreased to **45.27%**.

At the close of today's trade **BERGER (-10.00%)**, **CILEASING (-9.86%)**, **MECURE (-9.77%)**, **CHAMPION (-9.72%)** and **TIP (-9.66%)** were among the **40** market laggards as **129** stocks traded today.

Market activity measured by aggregate volume decreased by **14.93%**, with aggregate value depreciating by **6.91%**. Investors traded a total of **527.14mn** units of shares valued at **N15.36bn** in **24,492** deals.

The most active stocks by volume were **WEMABANK**, which traded **90.88mn**, followed by **CONHALLPLC** with **78.33mn** units, **MANSARD** with **32.34mn** units, **ACCESSCORP** with **23.37mn** units, and **ZENITHBANK** with **22.45mn** units.

The most active stocks by value were **WEMABANK**, which traded **N1.71bn**, followed by **GUINNESS** with **N1.69bn**, **ZENITHBANK** with **N1.34bn**, **MTNN** with **N1.11bn**, and **DANGCEM** with **N1.05bn**.

### SECTORAL PERFORMANCE

| INDEX      | CHANGE PRICE | CHANGE PERCENT % |
|------------|--------------|------------------|
| NGX30      | -17.54       | -0.32            |
| NGXBNK     | -12.51       | -0.88            |
| NGXCG      | -30.96       | -0.78            |
| NGXINDUSTR | -6.24        | -0.11            |
| NGXINS     | -25.02       | -2.15            |
| NGXOILGAS  | -6.84        | -0.25            |

## NGX Market Indices

|                 |                       |
|-----------------|-----------------------|
| All Share Index | 149,524.81            |
| Previous ASI    | 150,026.55            |
| % Day Change    | 0.33%                 |
| % Weekly Change | 2.99%                 |
| No. of Deals    | 24,492                |
| Volume          | 527,140,655           |
| Value           | 15,362,062,659.08     |
| Market Cap      | 94,998,133,422,453.40 |
| 1 Month High    | 155,645.05            |
| 1 Month Low     | 142,979.45            |

## NGX Top Gainers

| Symbols    | Daily | Price (₦) |
|------------|-------|-----------|
| NCR        | 1.75  | 19.35     |
| MCNICHOLS  | 0.27  | 3.02      |
| EUNISELL   | 6.00  | 70.90     |
| DEAPCAP    | 0.14  | 1.73      |
| ELLAHLAKES | 0.90  | 11.75     |

## NGX Top Losers

| Symbols   | Daily ▼ | Price (₦) |
|-----------|---------|-----------|
| BERGER    | 3.90    | 35.10     |
| CILEASING | 0.55    | 5.03      |
| MECURE    | 3.00    | 27.70     |
| CHAMPION  | 1.40    | 13.00     |
| TIP       | 1.15    | 10.75     |

## NGX Top Volume

| Symbols    | Price (₦) | Volumes (units) |
|------------|-----------|-----------------|
| WEMABANK   | 18.85     | 90,881,852      |
| CONHALLPLC | 4.26      | 78,338,818      |
| MANSARD    | 13.30     | 32,348,919      |
| ACCESSCORP | 22.00     | 23,373,262      |
| ZENITHBANK | 60.00     | 22,459,245      |

## NGX Top Value

| Symbols    | Price (₦) | Values (₦)       |
|------------|-----------|------------------|
| WEMABANK   | 18.85     | 1,710,149,466.80 |
| GUINNESS   | 176.70    | 1,690,319,715.30 |
| ZENITHBANK | 60.00     | 1,347,220,362.50 |
| MTNN       | 477.00    | 1,112,535,337.50 |
| DANGCEM    | 660.00    | 1,050,826,988.50 |

**CORPORATE ACTION**

| COMPANY                    | INTERIM DIVIDEND/ SHARE | QUALIFICATION DATE | PAYMENT DATE       |
|----------------------------|-------------------------|--------------------|--------------------|
| SEPLAT                     | \$0.75                  | November 13, 2025  | November 28, 2025  |
| Berger Paints              | 0.40                    | November 11, 2025  | November 19, 2025  |
| MTN                        | 5.00                    | November 20, 2025  | November 28, 2025  |
| NGX Group                  | 1.00                    | November 7, 2025   | November 18, 2025  |
| Aradel                     | 10.00                   | November 20, 2025  | November 28, 2025  |
| Ikeja Hotel                | 0.03                    | September 30, 2025 | November 28, 2025  |
| PRESCO                     | 30.00                   | November 7, 2025   | November 21, 2025  |
| Okomu Oil Palm Company Plc | 10.00                   | October 31, 2025   | November 14, 2025  |
| Legend Internet Plc        | 0.06                    | 29 October, 2025   | November 7, 2025   |
| 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  |

**NASD Market**

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,658.56**. Furthermore, Market Capitalization closed positively at **N2,189.00** Market activity measured by aggregate volume decreased to **221,284** units while values increased to **11,970,367.51** in **22** deals.

**GLOBAL MARKET INDICES**

| MARKET         | PREVIOUS CLOSE | TODAY'S CLOSE | %CHANGE |
|----------------|----------------|---------------|---------|
| DJIA           | 47,311.00      | 46,912.30     | 0.84%   |
| S&P 500        | 6,796.29       | 6,720.32      | 1.12%   |
| FTSE 100 INDEX | 9,760.26       | 9,643.40      | 1.20%   |
| GERMAN DAX     | 23,996.79      | 23,495.28     | 2.09%   |
| FRENCH CAC     | 9,366.00       | 9,266.37      | 1.06%   |
| NIKKEI 225     | 50,883.68      | 50,276.37     | 1.19%   |
| NGX (ASI)      | 150,026.55     | 149,524.81    | 0.33%   |

**MACRO ECONOMIC INDICATORS**

| PARAMETER           | CURRENT | PREVIOUS |
|---------------------|---------|----------|
| GDP (%)             | 4.23    | 3.48     |
| INFLATION (%)       | 18.02   | 20.12    |
| UNEMPLOYMENT (%)    | 4.30    | 5.30     |
| MPR (%)             | 27.00   | 27.50    |
| BRENT CRUDE (US \$) | 63.88   | 64.29    |

| 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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