

# Daily Market Report



Friday, November 28, 2025

## ASI closed the week on a bearish note by 14bps ..... gains 20bps for the day

The local bourse (NGX) closed the week on a bearish note, by **14bps** as a result of selling pressures and price depreciation during the week. In today's market, the local bourse (NGX) closed the day on a bullish note as ASI increased by **20bps** driven by price appreciation and increased buying interest in all sectoral tickers except **NGXINS** and **NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **143,519.81pts**.

Market Capitalization closed positively at **N91.28trillion**, as investors gained **N178.46billion**, and Year-to-date (YtD) gain increased to **39.44%**.

### What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **MTNN (0.13%)**, **ELLAHLAKES (5.32%)**, **UBA (1.25%)** and **GTCO (0.35%)** offsetting losses in **FIRSTHOLDCO (-0.16%)**, **CONHALLPLC (-6.06%)**, **FIDELITYBK (-0.26%)** and **EUNISELL (-6.36%)** 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**. The market breadth measured by advancers/ decliners was positive closing at **1.57x**, indicating more advancers than laggards. The top gainers include **IKEJAHOTEL (10.00%)**, **NGXGROUP (9.98%)**, **ACADEMY (9.70%)**, **OMATEK (9.35%)** and **CADBURY (8.63%)**.

### Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increased buying interest in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR** except **NGXINS**, and **NGXOILGAS**, which closed negatively. As a result, the year-to-date (YTD) gain increased to **39.44%**.

At the close of today's trade **ABBEYBDS (-10.00%)**, **MEYER (-9.97%)**, **SUNUASSUR (-9.89%)**, **SOVRENINS (-9.09%)** and **LINKASSURE (-8.02%)** were among the 21 market laggards as **127** stocks traded today.

Market activity measured by aggregate volume increased by **73.09%**, with aggregate value appreciating by **12.56%**. Investors traded a total of **560mn** units of shares valued at **N13.59bn** in **20,503** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **103.28mn**, followed by **ELLAHLAKES** with **82.70mn** units, **CONHALLPLC** with **59.13mn** units, **UBA** with **26.43mn** units, and **UNIVINSURE** with **16.70mn** units.

The most active stocks by value were **ACCESSCORP**, which traded **N2.16bn**, followed by **MTNN** with **N1.34bn**, **ELLAHLAKES** with **N1.09bn**, **UBA** with **N956.09mn**, and **ZENITHBANK** with **N908.04mn**.

### SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	10.70	0.20
NGXBNK	3.47	0.25
NGXCG	6.71	0.18
NGXINDUSTR	6.89	0.13
NGXINS	-25.41	-2.29
NGXOILGAS	-5.01	-0.19

## NGX Market Indices

All Share Index	143,519.81
Previous ASI	143,239.23
% Day Change	0.20%
% Weekly Change	0.14%
No. of Deals	20,503
Volume	560,007,588
Value	13,598,717,192.33
Market Cap	91,285,871,140,016.20
1 Month High	153,739.11
1 Month Low	141,327.30

## NGX Top Gainers

Symbols	Daily ▲	Price (₦)
IKEJAHOTEL	2.75	30.25
NGXGROUP	5.10	56.20
ACADEMY	0.65	7.35
OMATEK	0.10	1.17
CADBURY	4.60	57.90

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
ABBEYBDS	0.65	5.85
MEYER	1.45	13.10
SUNUASSUR	0.43	3.92
SOVRENINS	0.27	2.70
LINKASSURE	0.15	1.72

## NGX Top Volume

Symbols	Price (₦)	Volumes (units)
ACCESSCORP	21.00	103,289,063
ELLAHLAKES	13.85	82,707,951
CONHALLPLC	3.72	59,138,309
UBA	36.45	26,431,494
UNIVINSURE	1.17	16,700,788

## NGX Top Value

Symbols	Price (₦)	Values (₦)
ACCESSCORP	21.00	2,168,437,186.70
MTNN	470.60	1,347,828,549.30
ELLAHLAKES	13.85	1,099,868,759.42
UBA	36.45	956,097,432.45
ZENITHBANK	60.00	908,044,587.80

**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 negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,587.35**. Furthermore, Market Capitalization closed negatively at **2,146.39** Market activity measured by aggregate volume decreased to **106,889** units with values decreasing to **5,843,767.24** in **24** deals.

**GLOBAL MARKET INDICES**

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	47,303.19	47,427.12	0.00%
S&P 500	6,791.16	6,812.61	0.00%
FTSE 100 INDEX	9,676.55	9,717.50	0.32%
GERMAN DAX	23,643.12	23,834.31	0.20%
FRENCH CAC	9,476.92	9,517.02	0.24%
NIKKEI 225	49,559.07	50,253.91	0.17%
NGX (ASI)	143,064.57	143,519.81	0.20%

**MACRO ECONOMIC INDICATORS**

PARAMETER	CURRENT	PREVIOUS
GDP (%)	4.23	3.48
INFLATION (%)	16.05	18.02
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.00	27.50
BRENT CRUDE (US \$)	63.13	63.08

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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