

Daily Market Report



Friday, March 06, 2026

The ASI rebound week on week up by 216bps.....up by 9bps in today's market

The market rebound to close the week on a bullish note by **216bps**. In today's market, the local bourse (NGX) ended by **9bps** driven by price appreciation and increased buying interest in **NGX30, NGXINDUSTR, NGXOILGAS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **196,992.44**.

Market Capitalization closed positively at **N126.45trillion**, as investors gained **N15.59billion**, and Year-to-date (YtD) gain increased to **26.59%**.

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **NGXGROUP (1.99%), NB (2.5%), DANGCEM (0.62%)** and **OANDO (3.54%)** offsetting losses in **ZENITHBANK (-0.11%), FIRSTHOLDCO (-0.95%), MTNN (-0.63%)** and **ACCESSCORP (-0.19%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30, NGXINDUSTR, NGXOILGAS**. The market breadth measured by advancers/ decliners was positive closing at **1.06x**, indicating more advancers than laggards. The top gainers include **ETERNA (10%), PREMPAINTS (9.77%), UNIONDICON (9.7%), FTGINSURE (9.56%)** and **JOHNHOLT (9.25%)**.

Sectoral performance was mixed

Sectoral performance was mixed. Some of our observed indices closed positively due to increased buying interest in **NGX30, NGXINDUSTR, NGXOILGAS** while **NGXBNK, NGXINS** closed negatively. As a result, the year-to-date (YTD) gain increased to **26.59%**.

At the close of today's trade **RTBRISCOE (-10%), ABCTRANS (-9.96%), SCOA (-9.96%), MECURE (-9.96%)** and **BERGER (-9.93%)** were among the **33** market laggards as **133** stocks traded today.

Market activity measured by aggregate volume decreased by **7.57%**, while aggregate value depreciating by **5.23%**. Investors traded a total of **585.93mn** units of shares valued at **N30.61bn** in **62,518** deals.

The most active stocks by volume were **FIRSTHOLDCO**, which traded **43.91mn** units, followed by **ACCESSCORP** with **43.21mn** units, **ZENITHBANK** with **39.98mn** units, **GTCO** with **38.86mn** units, and **JAIZBANK** with **31.51mn** units.

The most active stocks by value were **GTCO**, which traded **N4.62bn**, followed by **ARADEL** with **N3.79bn**, **ZENITHBANK** with **N3.71bn**, **OKOMUOIL** with **N2.34bn**, and **FIRSTHOLDCO** with **N2.27bn**.

SECTORAL PERFORMANCE

| INDEX | CHANGE PRICE | CHANGE PERCENT % |
|------------|--------------|------------------|
| NGX30 | 3.71 | 0.05 |
| NGXBNK | -2.15 | -0.11 |
| NGXCG | 0.22 | 0.00 |
| NGXINDUSTR | 89.79 | 1.20 |
| NGXINS | -8.19 | -0.61 |
| NGXOILGAS | 8.61 | 0.19 |

NGX Market Indices

| | |
|-----------------|------------------------|
| All Share Index | 196,992.44 |
| Previous ASI | 196,807.15 |
| % Day Change | 0.09% |
| % Weekly Change | 2.16% |
| No. of Deals | 62,518 |
| Volume | 585,936,257 |
| Value | 30,618,026,620.59 |
| Market Cap | 126,555,893,268,314.00 |
| 1 Month High | 196,992.44 |
| 1 Month Low | 192,826.78 |

NGX Top Gainers

| Symbols | Daily ▲ | Price (₦) |
|------------|---------|-----------|
| ETERNA | 3.85 | 42.35 |
| PREMPAINTS | 1.30 | 14.60 |
| UNIONDICON | 1.45 | 16.40 |
| FTGINSURE | 0.13 | 1.49 |
| JOHNHOLT | 0.80 | 9.45 |

NGX Top Losers

| Symbols | Daily ▼ | Price (₦) |
|-----------|---------|-----------|
| RTBRISCOE | 1.34 | 12.06 |
| ABCTRANS | 0.69 | 6.24 |
| SCOA | 3.80 | 34.35 |
| MECURE | 6.80 | 61.50 |
| BERGER | 7.35 | 66.65 |

NGX Top Volume

| Symbols | Price (₦) | Volumes (units) |
|-------------|-----------|-----------------|
| FIRSTHOLDCO | 52.00 | 43,914,794 |
| ACCESSCORP | 25.95 | 43,214,408 |
| ZENITHBANK | 93.00 | 39,988,755 |
| GTCO | 119.00 | 38,866,980 |
| ZENITHBANK | 93.10 | 24,340,536 |

NGX Top Value

| Symbols | Price (₦) | Values (₦) |
|-------------|-----------|------------------|
| GTCO | 119.00 | 4,623,732,245.20 |
| ARADEL | 1,300.40 | 3,798,750,749.70 |
| ZENITHBANK | 93.00 | 3,718,369,909.70 |
| OKOMUOIL | 1,765.00 | 2,348,601,053.50 |
| FIRSTHOLDCO | 52.00 | 2,278,704,647.00 |

CORPORATE ACTION

| COMPANY | FINAL DIVIDEND/ SHARE | QUALIFICATION DATE | PAYMENT DATE |
|-----------------------------------|-----------------------|--------------------|---------------------|
| Mecure industries plc | 0.32 | April 23, 2026. | Till further notice |
| Nascon Allied Industries | 6.00 | April 1, 2026. | April 28, 2026 |
| Dangote Cement Plc | 45.00 | June 17, 2026 | July 2, 2026 |
| United Capital Plc | 0.70 | April 7, 2026 | April 24, 2026 |
| MTN Nigeria Communications Plc | 15.00 | April 8, 2026 | May 5, 2026 |
| Zichis Agro Allied Industries Plc | 0.20 | March 16, 2026 | April 29, 2026 |
| Africa Prudential Plc | 0.40 | March 12, 2026 | April 2, 2026 |
| Haldane McCall PLC | 0.05 | May 28, 2026 | June 18, 2026, |
| BUA CEMENT PLC | 10.00 | May 8, 2026 | May 21, 2026 |
| Nigerian Exchange Group | 2.00 | April 10, 2026 | April 28, 2026 |
| Transcorp | 1.60 | May 1, 2026 | May 19, 2026 |
| Wapco (Lafarge Cement) | 6.00 | April 3, 2026 | April 10, 2026 |
| Seplat | \$0.085 | May 15, 2026 | May 29, 2026 |
| Transcorp | 4.00 | April 17, 2026 | May 5, 2026 |
| Geregu Power | 9.00 | April 13, 2026 | April 30, 2026 |

NASD Market

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **4,210.92**. Furthermore, Market Capitalization closed positively **2,519.49**. Market activity measured by aggregate volume decreased to **3,393,663** units with values decreasing to **62,449,927.50** in **44** deals.

GLOBAL MARKET INDICES

| MARKET | PREVIOUS CLOSE | TODAY'S CLOSE | %CHANGE |
|----------------|----------------|---------------|---------|
| DJIA | 47,954.74 | 47,501.55 | 0.95% |
| S&P 500 | 6,830.71 | 6,740.02 | 1.33% |
| FTSE 100 INDEX | 10,572.89 | 10,284.75 | 2.73% |
| GERMAN DAX | 23,815.75 | 23,591.03 | 0.94% |
| FRENCH CAC | 9,427.01 | 9,215.25 | 2.25% |
| NIKKEI 225 | 55,278.06 | 55,620.84 | 0.62% |
| NGX (ASI) | 196,968.15 | 196,992.44 | 0.09% |

MACRO ECONOMIC INDICATORS

| PARAMETER | CURRENT | PREVIOUS |
|---------------------|---------|----------|
| GDP (%) | 4.07 | 3.98 |
| INFLATION (%) | 15.10 | 15.15 |
| UNEMPLOYMENT (%) | 4.90 | 4.60 |
| MPR (%) | 26.50 | 27.00 |
| BRENT CRUDE (US \$) | 92.91 | 83.19 |

| 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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