

# Daily Market Report



Friday, March 13, 2026

## The market rebounds week on week up by 73bps..... appreciating by 76bps today

The market rebounds to close the week on a bullish note by **73bps**. In today's market, the local bourse (NGX) increased by **76bps** driven by price appreciation and increased buying interest in all sectoral tickers except **NGXINS**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **198,407.30pts**.

Market Capitalization closed positively at **N127.35trillion**, as investors gained **N960.87billion**, and Year-to-date (YtD) gain increased to **27.50%**.

### 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 (0.15%)**, **GTCO (0.04%)**, **WAPCO (4.85%)** and **ZENITHBANK (3.01%)** offsetting losses in **DANGCEM (-1.86%)**, **NGXGROUP (-6.12%)**, **UBA (-0.87%)** and **UCAP (-0.82%)** 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**, **NGXOILGAS**. The market breadth measured by advancers/ decliners was positive, closing at **1.75x**, indicating more advancers than laggards. The top gainers include **GUINNESS (10.00%)**, **ROYALEX (10.00%)**, **UPL (10.00%)**, **MAYBAKER (9.93%)** and **FTGINSURE (9.26%)**.

### Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increase buying interest in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXOILGAS** except **NGXINS** which closed negatively. As a result, the year-to-date (YTD) gain increased to **27.50%**.

At the close of today's trade **RTBRISCOE (-9.17%)**, **LEARNAFRCA (-8.33%)**, **NGXGROUP (-6.12%)**, **HMCALL (-5.78%)** and **MANSARD (-5.63%)** were among the **20** market laggards as **131** stocks traded today.

Market activity measured by aggregate volume decreased by **98.68%**, with aggregate value depreciating by **99.97%**. Investors traded a total of **590.86mn** units of shares valued at **N34.95bn** in **52,830** deals.

The most active stocks by volume were **FIRSTHOLDCO**, which traded **70.83mn** units, followed by **ACCESSCORP** with **67.17mn** units, **GTCO** with **33.61mn** units, **ELLAHLAKES** with **27.08mn** units, and **STERLINGNG** with **25.19mn** units.

The most active stocks by value were **MTNN**, which traded **N6.68bn**, followed by **GTCO** with **N3.95bn**, **ARADEL** with **N3.55bn**, **FIRSTHOLDCO** with **N3.54bn**, and **DANGCEM** with **N2.93bn**.

### SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	55.88	0.78
NGXBNK	15.71	0.84
NGXCG	32.31	0.59
NGXINDUSTR	238.52	3.06
NGXINS	-6.39	-0.50
NGXOILGAS	3.63	0.08

## NGX Market Indices

All Share Index	198,407.30
Previous ASI	196,910.40
% Day Change	0.76%
% Weekly Change	0.73%
No. of Deals	52,830
Volume	590,867,693
Value	34,958,379,194.21
Market Cap	127,359,544,238,950.00
1 Month High	198,407.30
1 Month Low	192,826.78

## NGX Top Gainers

Symbols	Daily ▲	Price (₦)
GUINNESS	35.00	385.00
ROYALEX	0.17	1.87
UPL	0.50	5.50
MAYBAKER	3.75	41.50
FTGINSURE	0.10	1.18

## NGX Top Losers

Symbols	Daily ▼	Price (₦)
RTBRISCOE	1.05	10.40
LEARNAFRCA	0.75	8.25
NGXGROUP	11.50	176.50
HMCALL	0.24	3.91
MANSARD	0.89	14.91

## NGX Top Volume

Symbols	Price (₦)	Volumes (units)
FIRSTHOLDCO	50.00	70,831,803
ACCESSCORP	24.90	67,172,849
GTCO	117.50	33,617,436
ELLAHLAKES	12.05	27,082,745
STERLINGNG	7.90	25,194,627

## NGX Top Value

Symbols	Price (₦)	Values (₦)
MTNN	779.10	6,681,699,502.30
GTCO	117.50	3,951,584,580.00
ARADEL	1,340.00	3,559,465,229.60
FIRSTHOLDCO	50.00	3,541,722,075.95
DANGCEM	794.90	2,935,810,078.80

**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 negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **4,210.30**. Furthermore, Market Capitalization closed negatively at **2,519.12**. Market activity measured by aggregate volume increased to **3,721,437** units with values increasing to **95,020,973.31** in **52** deals.

**GLOBAL MARKET INDICES**

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	47,706.51	46,677.85	2.16%
S&P 500	6,781.48	6,672.62	1.61%
FTSE 100 INDEX	10,322.70	10,340.41	0.17%
GERMAN DAX	23,599.63	23,650.76	0.22%
FRENCH CAC	9,197.33	9,161.87	0.39%
NIKKEI 225	55,025.37	53,819.61	2.19%
NGX (ASI)	196,908.76	198,407.30	0.76%

**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 \$)	99.03	99.70

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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