Daily Market Report

Monday, July 27, 2026

Market opens the week flat…………………………….All Share Index decreased by 5bps.

Market opens the week flat. In today's market, the local bourse (NGX) closed the day flat as ASI declined by **5bps,** driven by price depreciation and profit taking in all sectoral tickers except **NGXBNK**, **NGXCG**. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **247,238.74**.

Market Capitalization closed negatively at **N159.51trillion**, as investors lost **N76.55billion**, and Year-to-date (YtD) gain decreased to **58.88%.**

What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **ACCESSCORP (-7.53%), BUACEMENT (-2.47%), OANDO (-4.25%) and STANBIC (-0.03%)** offsetting gains in **FIRSTHOLDCO (4.56%), ZENITHBANK (0.32%), MTNN (0.94%)** and **NGXGROUP (6.96%)** which kept the ASI in negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGXCNSMRGDS, NGXINDUSTR, NGXINS, NGXOILGAS**. The market breadth measured by advancers/ decliners was negative closing at **0.87x**, indicating more laggards than advancers The top gainers include **CNIF (9.95%), THOMASWY (9.92%), LASACO (9.89%), CMFC (9.18%)** and **CHAMS (7.78%).**

Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and profit taken in **NGXCNSMRGDS, NGXINDUSTR, NGXINS, NGXOILGAS except NGXBNK, NGXCG** which closed positively. As a result, the year-to-date (YTD) gain decreased to **58.88%.**

At the close of today's trade **SUNUASSUR (-10.00%), TRANSPOWER (-10.00%), INTBREW (-9.85%), NEIMETH (-9.78%)** and **AUSTINLAZ (-9.64%)** were among the **32** market laggards as **133** stocks traded today.

Market activity measured by aggregate volume decreased by **0.25%,** with aggregate value depreciating by **1.09%.** Investors traded a total of **612.92mn** units of shares valued at **N32.56bn** in **71,006** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **47.57mn** units, followed by **FCMB** with **40.33mn** units, **FIRSTHOLDCO** with **34.19mn** units, **CHAMPION** with **33.15mn** units, and **ZENITHBANK** with **25.44mn** units.

The most active stocks by value were **ARADEL**, which traded **N4.67bn**, followed by **FIRSTHOLDCO** with **N4.24bn**, **ZENITHBANK** with **N3.22bn**, **MTNN** with **N2.9bn**, and **NASCON** with **N1.62bn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGXCNSMRGDS	-48.30	-1.07
NGXBNK	19.91	0.78
NGXCG	53.18	0.76
NGXINDUSTR	-6.59	-0.06
NGXINS	-19.90	-1.69
NGXOILGAS	-7.44	-0.14

NGX Market Indices

All Share Index	247,238.74
Previous ASI	247,357.40
% Day Change	0.05%
% Weekly Change	0.05%
No. of Deals	71,006
Volume	612,920,661
Value	32,560,493,056.74
Market Cap	159,511,421,507,399.00
1 Month High	247,832.97
1 Month Low	224,321.97

NGX Top Gainers

Symbols	Daily ▲	Price (₦)
CNIF	12.70	140.30
THOMASWY	0.36	3.99
LASACO	0.18	2.00
CMFC	0.29	3.45
CHAMS	0.35	4.85

NGX Top Losers

Symbols	Daily ▼	Price (₦)
SUNUASSUR	0.36	3.24
TRANSPOWER	24.40	219.6
INTBREW	1.35	12.35
NEIMETH	0.90	8.30
AUSTINLAZ	0.35	3.28

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
ACCESSCORP	27.00	47,574,630
FCMB	12.00	40,333,175
FIRSTHOLDCO	126.00	34,197,335
CHAMPION	11.25	33,152,380
ZENITHBANK	126.90	25,441,561

NGX Top Value

Symbols	Price (₦)	Values (₦)
ARADEL	1,526.80	4,671,530,012.20
FIRSTHOLDCO	126.00	4,247,718,046.25
ZENITHBANK	126.90	3,228,175,764.70
MTNN	858.00	2,902,719,144.80
NASCON	196.00	1,626,515,402.20

CORPORATE ACTION

COMPANY	FINAL DIVIDEND/ SHARE	QUALIFICATION DATE	PAYMENT DATE
Africa Prudential Plc	0.10	July 20	July 23
Transcorp Power Plc	1.50	July 20	July 23
Airtel Africa Plc	58.59	June 17	July 24
Ikeja Hotel Plc	0.30	July 3	July 24
Transcorp Hotels Plc	0.10	July 22	July 27
Nigeria Infrastructure Debt Fund	4.40	July 17	July 27
Coronation Infrastructure Fund	8.985	July 22	July 28
United Capital Plc	0.30	July 27	July 30
Fidson Healthcare Plc	1.50	April 14	July 31
Aradel Holdings Plc	23.00	July 9	July 31
Unilever Nigeria Plc	2.00	July 31	August 15
Ikeja Hotel Plc	0.30	August 7	September 4
University Press Plc	0.18	August 28	September 24
Learn Africa Plc	0.35	September 11	September 25
ETRANZACT International Plc	0.125	July 6	Till further notice
Mecure industries plc	0.32	April 23, 2026.	Till further notice

NASD Market

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **4,342.60.** Furthermore, Market Capitalization closed positively at **2,606.49bn.** Market activity measured by aggregate volume decreased to **604,565** units with values decreasing to **19,610,442.52** in **33** deals**.**

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	51,947.25	52,241.56	0.57%
S&P 500	7,411.98	7,421.40	0.13%
FTSE 100 INDEX	10,736.23	10,806.96	0.66%
GERMAN DAX	25,099.00	25,422.14	1.29%
FRENCH CAC	9,446.05	9,526.42	0.85%
NIKKEI 225	64,611.15	64,931.19	0.50%
NGX (ASI)	247,357.40	247,238.74	0.05%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.89	4.07
INFLATION (%)	15.91	15.93
UNEMPLOYMENT (%)	4.90	4.60
MPR (%)	26.50	26.50
BRENT CRUDE (US $)	86.29	87.51

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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