Daily Market Report

Tuesday, October 27, 2026

Market closes today on a one month high .....as ASI gains 107bps in today's session

The local bourse market close on a bullish note appreciating by **165bps**. In today's session, the All-Share Index gained **107bps**, 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 **253,990.06.**

Market Capitalization closed positively at **N164.91trillion**, as investors gained **N1.47trillion**, and Year-to-date (YtD) gain increased to **63.22%.**

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increased buying interest in **DANGCEM (9.80%), STANBIC (3.06%), HONYFLOUR (9.67%)** and **ACCESSCORP (3.26%)** offsetting losses in **GTCO (-1.52%), ZENITHBANK (-0.33%), UBA (-1.35%)** and **NGXGROUP (-1.82%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in **NGXBNK, NGXCG, NGXINDUSTR** and **NGXCNSMRGDS**. The market breadth measured by advancers/ decliners was negative closing at **0.57x,** indicating more laggards than advancers. The top gainers include **DANGCEM (10.00%), HONYFLOUR (9.78%), ROYALEX (9.18%), NGXGROUP (8.29%)** and **FIRSTHOLDCO (7.56%).**

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Sectoral performance was positive. All our observed indices closed positively due to increased buying interest in **NGXBNK, NGXCG, NGXINDUSTR, NGXCNSMRGDS** except **NGXINS** and **NGXOILGAS** which closed negatively. As a result, the year-to-date (YTD) gain increased to **63.22%.**

At the close of today's trade **PRESCO (-10.00%), TRIPPLEG (-9.93%), THOMASWY (-9.85%), AUSTINLAZ (-9.81%)** and **TRANSCORP (-9.70%)** were among the **42** market laggards as **144** stocks traded today.

Market activity measured by aggregate volume increased by **14.39%,** with aggregate value appreciated by **10.95%.** Investors traded a total of **376.92mn** units of shares valued at **N28.22bn** in **35,694**deals.

The most active stocks by volume were **HONYFLOUR**, which traded **32.64mn** units, followed by **GTCO** with **30.69mn** units, **ZENITHBANK** with **27.58mn** units, **UBA** with **21.68mn** units, and **FIRSTHOLDCO** with **20.33mn** units.

The most active stocks by value were **DANGCEM**, which traded **N5.39bn**, followed by **GTCO** with **N3.86bn**, **ZENITHBANK** with **N3.32bn**, **FIRSTHOLDCO** with **N3.07bn**, and **MTNN** with **N2.24bn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGXCNSMRGDS	1.84	0.05
NGXBNK	0.16	0.01
NGXCG	12.47	0.17
NGXINDUSTR	616.5	5.5
NGXINS	25.83	2.44
NGXOILGAS	0.56	0.01

NGX Market Indices

All Share Index	253,990.06
Previous ASI	251,290.54
% Day Change	1.07%
% Weekly Change	2.74%
No. of Deals	35,694
Volume	376,924,245
Value	28,219,546,876
Market Cap	164,913,375,901,015.00
1 Month High	253,990.06
1 Month Low	244,956.94

NGX Top Gainers

Symbols	Daily ▲	Price (₦)
UPDCREIT	1.75	19.25
DANGCEM	119.80	1341.9
HONYFLOUR	1.90	21.55
AVACAP	0.65	7.55
NAHCO	11.20	151.20

NGX Top Losers

Symbols	Daily ▼	Price (₦)
PRESCO	204.5	1840.80
TRIPPLEG	0.28	2.54
THOMASWY	0.27	2.47
AUSTINLAZ	0.26	2.39
TRANSCORP	3.50	32.60

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
HONYFLOUR	21.55	32,639,288
GTCO	123.20	30,692,921
ZENITHBANK	120.50	27,578,535
UBA	40.25	21,676,909
FIRSTHOLDCO	155.00	20,326,058

NGX Top Value

Symbols	Price (₦)	Values (₦)
DANGCEM	1,341.90	5,389,196,722
GTCO	123.20	3,859,184,124
ZENITHBANK	120.50	3,324,582,574
FIRSTHOLDCO	155.00	3,070,632,519
MTNN	825.00	2,241,931,124

CORPORATE ACTION

COMPANY	DIVIDEND/ SHARE	QUALIFICATION DATE	PAYMENT DATE
UNILEVER	0.02	October 30	November 18
IKEJA HOTEL	0.03	November 6	December 4
NIDF	4.53	October 21	October 29
PZ Cussions	2.50	October 9	October 30
Zenith Bank Plc	1.50	October 23	October 30
Stanbic IBTC Holdings PLC	4.50	October 15	November 13
Guinness Nigeria Plc	7.00	October 30	November 13
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 **4,296.05**. Furthermore, Market Capitalization closed positively at **2,578.55bn**. Market activity measured by aggregate volume increased to **8,038,639** units with value increasing to **29,491,542** in **32** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	52,361.58	52,285.20	0.15%
S&P 500	7,676.77	7,697.96	0.28%
FTSE 100 INDEX	10,767.33	10,686.07	0.75%
GERMAN DAX	25,410.84	25,584.79	0.68%
FRENCH CAC	8,869.51	8,915.27	0.52%
NIKKEI 225	62,189.65	63,268.37	1.73%
NGX (ASI)	247,222.27	251,290.54	1.65%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	4.43	3.89
INFLATION (%)	14.63	15.39
FOREIGN RESERVES (USD'BN)	55.25	55.17
MPR (%)	23.00	26.50
BRENT CRUDE (US $)	110.12	110.74

DIRECTORS DEALINGS

TRANSACTION DATE	COMPANY	NAME	POSITION	NATURE OF TRANSACTION	AVERAGE PRICE(Naira)	AVERAGE VOLUME(Units)
10-25 September 2026	MTNN	Moses Oyerinde	Senior Manager	Sale	819.38	25,000
21-28 September 2026	NEIMETH	Clinoscope Services ltd	Substantial Shareholder	Purchase	8.16	2,810,304
23 September 2026	NAHCO	Saheed Lasisi	Executive Director	Sale	139.00	193,835
25-29 September 2026	ABCTRANS	Nneji Francis Uzor	Non-Executive Director	Purchase	5.70	658,796
30 September 2026	UACN	Olatunji Rabiu	Employee	Crystallisation	NIL	2,666,549
30 September 2026	MTNN	Osebi Ufot/Saidat Badru	Staff	Sale	856.89	8,082
30 September 2026	MTNN	Chioma Ike	Coordinator	Purchase	861 .00	1,126
2 October 2026	NGXGROUP	Mr. Sehinde Adenagbe	Non-Executive Director	Purchase	168.90	40,000

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