Daily Market Report

Friday, October 30, 2026

Market ends the week 286bps higher…….as All Share Index inched 9bps today.

Market ends the week **286bps** higher. In today's market, the local bourse (NGX) closed the day on a positive note as ASI increased by **9bps,** driven by price appreciation and increased buying interest. As a result, the benchmark All Share Index (ASI) closed positively to settle at **254,299.49.**

Market Capitalization closed positively at **N165.11trillion**, as investors gained **N140.55billion**, and Year-to-date (YtD) gain increased to **63.42%.**

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **FIDELITYBK (9.09%), MTNN (3.03%), WEMABANK (3.23%) and HONYFLOUR (10.00%)** offsetting losses in **FIRSTHOLDCO (-5.1%), GTCO (-0.74%), STANBIC (-1.76%)** and **ZENITHBANK (-0.83%)** which kept the ASI in a positive terrain. The market breadth measured by advancers/ decliners was negative closing at **0.78x**, indicating more laggards than advancers. The top gainers include **HONYFLOUR (10.00%), MAYBAKER (10.00%), LIVESTOCK (9.92%), ETERNA (9.9%) and PZ (9.85%).**

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Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and profit taken in **NGXCNSMRGDS, NGXBNK, NGXCG, NGXINS, NGXOILGAS** except **NGXINDUSTR** which closed flat. As a result, the year-to-date (YTD) gain increased to **63.42%.**

At the close of today's trade **CAVERTON (-10.00%), LIVINGTRUST (-9.94%), VERITASKAP (-9.91%), UPDC (-9.46%)** and **FTGINSURE (-9.46%)** were among the **32** market laggards as **134** stocks traded today.

Market activity measured by aggregate volume increased by **145.18%,** with aggregate value appreciating **168.31%.** Investors traded a total of **831.55mn** units of shares valued at **N68.83bn** in **37,619** deals.

The most active stocks by volume were **FIRSTHOLDCO,** which traded **414.34mn units**, followed by **FIDELITYBK** with **51.47mn** units**, GTCO** with **36.53mn** units, **SOVRENINS** with **22.69mn** units, and **AIICO** with **17.08mn** units.

The most active stocks by value were **FIRSTHOLDCO**, which traded **N49.57bn,** followed by **GTCO** with **N4.4bn, STANBIC** with **N1.68bn, DANGCEM** with **N1.31bn,** and **FIDELITYBK** with **N1.17bn.**

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGXCNSMRGDS	2.63	0.07
NGXBNK	31.75	1.29
NGXCG	36.17	0.51
NGXINDUSTR	0.27	0.00
NGXINS	9.98	0.96
NGXOILGAS	3.83	0.06

NGX Market Indices

All Share Index	254,299.49
Previous ASI	254,083.02
% Day Change	0.09%
% Weekly Change	2.86%
No. of Deals	37,619
Volume	831,551,322
Value	68,830,103,765.51
Market Cap	165,114,281,333,469.00
1 Month High	254,299.49
1 Month Low	244,956.94

NGX Top Gainers

Symbols	Daily ▲	Price (₦)
HONYFLOUR	2.05	22.55
MAYBAKER	3.8	41.8
LIVESTOCK	1.20	13.30
ETERNA	3.85	42.75
PZ	6.45	71.95

NGX Top Losers

Symbols	Daily ▼	Price (₦)
CAVERTON	0.40	3.60
LIVINGTRUST	0.32	2.90
VERITASKAP	0.11	1.00
UPDC	0.35	3.35
FTGINSURE	0.16	1.59

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
FIRSTHOLDCO	119.15	414,348,715
FIDELITYBK	24.00	51,471,305
GTCO	120.00	36,539,982
SOVRENINS	2.35	22,699,432
AIICO	3.55	17,085,605

NGX Top Value

Symbols	Price (₦)	Values (₦)
FIRSTHOLDCO	119.15	49,579,220,234.45
GTCO	120.00	4,409,537,503.70
STANBIC	162.00	1,688,505,019.20
DANGCEM	1,420.00	1,319,204,485.70
FIDELITYBK	24.00	1,177,573,239.65

CORPORATE ACTION

COMPANY	DIVIDEND/ SHARE	QUALIFICATION DATE	PAYMENT DATE
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
Okomu Oil Palm Company Plc	11.50	November 11	November 17
Unilever Nigeria Plc	2.00	October 30	November 18
Berger Paints Nigeria Plc	0.50	November 12	November 20
Seplat Energy (Interim + Special)	US 5 cent + US 14 cent	November 12	November 27
Ikeja Hotel Plc	0.30	November 6	December 4
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 negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **4,282.07**. Furthermore, Market Capitalization closed negatively at **2,570.16bn**. Market activity measured by aggregate volume decreased to **173,527** units with value decreasing to **13,070,330** in **35** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	52,342.56	51,987.38	0.68%
S&P 500	7,720.39	7,599.58	1.56%
FTSE 100 INDEX	10,722.07	10,721.32	0.01%
GERMAN DAX	26,039.68	25,819.68	0.84%
FRENCH CAC	8,982.26	8,975.29	0.08%
NIKKEI 225	64,659.47	63,290.11	2.12%
NGX (ASI)	254,083.02	254,299.49	0.09%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	4.43	3.89
INFLATION (%)	14.63	15.39
FOREIGN RESERVES (USD'BN)	55.24	55.25
MPR (%)	23.00	26.50
BRENT CRUDE (US $)	113.77	110.80

DIRECTORS DEALINGS

TRANSACTION DATE	COMPANY	NAME	POSITION	NATURE OF TRANSACTION	AVERAGE PRICE(Naira)	AVERAGE VOLUME(Units)
29 October 2026	AVA CAPITAL PLC	Many	Employees	Sale	7.38	3,840,500
27 October 2026	FIRSTHOLDCO	Anil Dua	Non-Executive Director	Purchase	90.00	4,100,000
27 October 2026	AVA CAPITAL PLC	Many	Employees	Sale	6.78	571,328
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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