

Equities Market Summary

Today, the Nigerian Stock Exchange Market closed on a positive note following share price appreciation in ZENITH BANK (+9.94%) and UBA (+9.97%). As a result, the benchmark All-Share Index (NGX-ASI) rose by 1.37% to close at 126,151.04 points. Year to date returns rose to 22.56%, while market capitalization closed at N79.80tn. Activity level in the market improved with the total value and volume of stocks traded rising by 7.01% and 7.31% to print at N29.67bn and 1.37bn units, respectively.

Corporate Actions

- Omatek Ventures PLC will meet 28-Jul-2025 to consider its Second Quarter Unaudited Financial Statements for the period ended 30-June-2025.

Top Five Gainers

The top Five (5) gainers out of Fifty-nine (59) stocks that appreciated in the market today

Symbol	Opening Price	Closing Price	Change (%)
NEM	20.00	22.00	10.00%
CONHALLPLC	3.30	3.63	10.00%
CADBURY	55.00	60.50	10.00%
GUINNESS	88.00	96.80	10.00%
REDSTAREX	12.22	13.44	9.98%

Top Five Traded Volume

ACCESSCORP recorded the highest traded volume

Symbol	Closing Price	Daily Volume
ACCESSCORP	24.80	172,915,797.00
ELLAHLAKES	12.63	144,912,738.00
JAPAUFGOLD	3.35	138,737,316.00
UBA	43.55	73,029,157.00
AIICO	2.27	60,679,562.00

NGX ASI Performance Indicators

The market was bullish with the ASI rising by 1.37% to close at 126,151.04

Headline	Value	1 day change	YTD
NGX ASI	126,151.04	1.37%	22.56%
Mkt. Cap (N'bn)	79,803.28	1.37%	27.15%
Mkt. Cap (\$'mn)	52,296.41	1.37%	27.97%
Value (N'mn)	29,671.01	7.01%	N/A
Value (\$'mn)	0.9	7.31%	
Volume (units 'mn)	1,373.74	7.31%	
Deals	32,931.00	18.14%	
Market Breadth	2.6x	N/A	

Top Five Losers

The top Five (5) losers out of Twenty-three (23) stocks that depreciated in the market today

Symbol	Opening Price	Closing Price	Change (%)
LEARNAFRCA	6.58	6.01	(8.66%)
TANTALIZER	3.20	3.00	(6.25%)
PRESTIGE	1.33	1.25	(6.02%)
REGALINS	0.89	0.84	(5.62%)
OANDO	54.2	51.7	(4.61%)

Top Five Traded Value

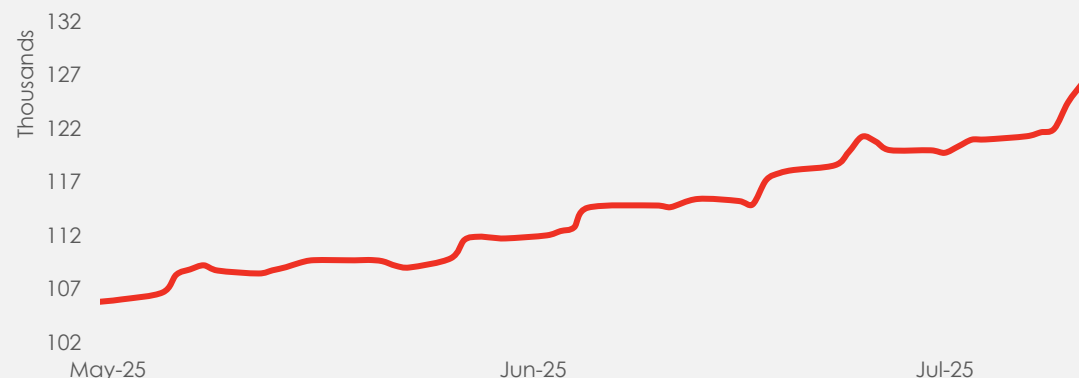
ACCESSCORP recorded the highest traded value

Symbol	Closing Price	Daily Value
ACCESSCORP	24.80	4,156,173,303.15
UBA	43.55	3,149,565,089.80
GTCO	94.10	2,006,777,745.45
ELLAHLAKES	12.63	1,819,027,888.09
DANGCEM	425.00	1,700,859,581.70

NGX ASI Performance Indicators

Nigerian Exchange All-Share Index (NGX)

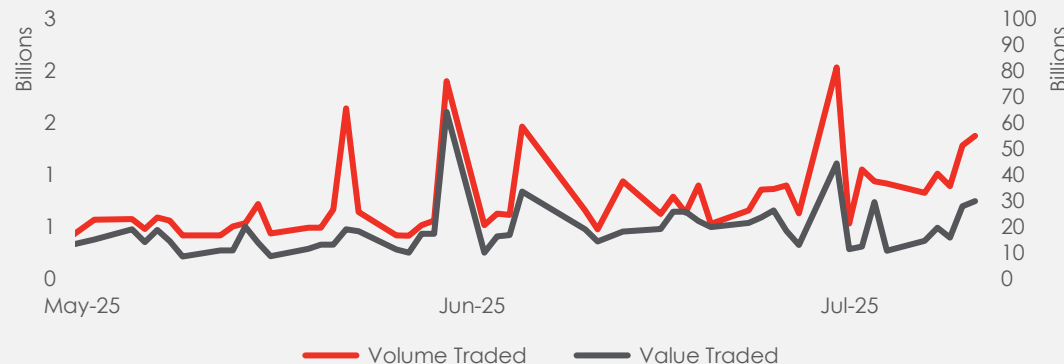
NGX-ASI Up 1.37% to close at 126,151.04



Trading Activity

Trade Activities

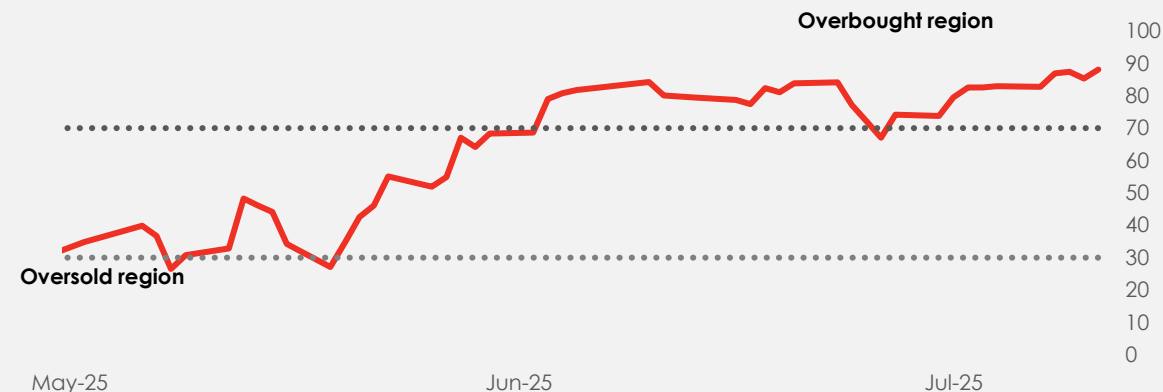
Market activity improved with the total value and volume of stocks traded climbing by 7.01% and 7.31%



Relative Strength Index (RSI)

Technical Indicator of Market Position: Relative Strength Index (RSI)

RSI still in the Overbought region, fell by 3.17% to 88.0



Sector Performance

On a sectorial level, performance was bullish as Three (3) out of the Five (5) sectors under our coverage closed in the green zone.

Sectors	1 Day Change	Month To Date Change	YTD	P/E(x)	Div. Yield
Banks	5.2%	13.4%	33.9%	1.6	7.3%
Consumer Goods	(0.3%)	5.5%	60.6%	n.a	0.7%
Industrial	0.5%	0.0%	1.8%	15.1	5.0%
Insurance	3.3%	19.2%	25.4%	6.6	3.4%
Oil & Gas	(0.6%)	0.3%	(9.9%)	7.9	3.8%
Mkt. Avg. P/E	7.20		Mkt. Avg. Div. Yid		3.5%

Global Equities Market

U.S. stocks fell Friday after President Donald Trump said Canada will face 35% trade tariffs from next month and threatened higher tariffs elsewhere, ramping up concerns over the impact of his trade policies.

Index	Current	1 Day Change	Week to date Change	% Δ YTD
S&P 500	6,246.50	(0.50%)	(0.50%)	6.20%
Dow Jones	44,324.00	(0.70%)	(1.10%)	4.20%
Nasdaq	20,570.40	(0.30%)	(0.10%)	6.50%
FTSE 100	8,929.70	(0.50%)	1.20%	9.30%
NIKKEI	39,569.70	(0.20%)	0.00%	(0.80%)

Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bullish with Nine (9) Indices rising northward.

Equities	Level	1 day Change	YTD	P/E (x)	Div. Yld
BRVM	305.10	0.00%	10.60%	n.a.	6.6%
Egypt	33,324.40	0.50%	12.10%	7.9	2.5%
Ghana	6,425.80	0.10%	31.30%	5.6	2.9%
Kenya	159.1	(0.50%)	29.80%	6.9	6.9%
Mauritius	2,368.40	0.40%	(1.60%)	6.4	5.2%
Morocco	438.2	0.00%	26.10%	n.a	2.3%
MSCI FM	641.8	0.50%	20.50%	n.a	3.9%
South Africa	97,022.10	(0.60%)	15.10%	16.9	3.4%
Tunisia	11,746.20	0.40%	17.40%	26.5	1.9%
Zimbabwe	43,468,660.00	1.20%	(10.70%)	na	6.6%
Nigeria (NGX)	126,149.57	1.37%	22.56%	7.4	0.03

Global Fixed Income Market

We observed bearish sentiments in the Global Fixed Income Market.

Index	Current	1 Day Change	Week to date change
US-10Y	4.4	0.40%	0.40%
UK-10Y	4.6	0.20%	0.60%
JP-10Y	1.5	0.20%	0.70%
DE-10Y	2.7	0.20%	1.00%

Global Currency Market

The U.S Dollar recorded mixed performance against other major global currencies.

Currencies	Current	1 day Change	Week to date Change	% Δ YTD
GBP/USD	1.3	(0.60%)	(1.10%)	7.90%
EUR/USD	1.2	0.00%	(0.70%)	13.00%
JPY/USD	0.0	0.60%	1.90%	(6.40%)
CNY/USD	0.1	(0.10%)	0.00%	(1.80%)

Key:

YTD – Year to Date change