

**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
JAPAULGOLD	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 (₦'bn)	79,803.28	1.37%	27.15%
Mkt. Cap (\$'mn)	52,296.41	1.37%	27.97%
Value (₦'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%)

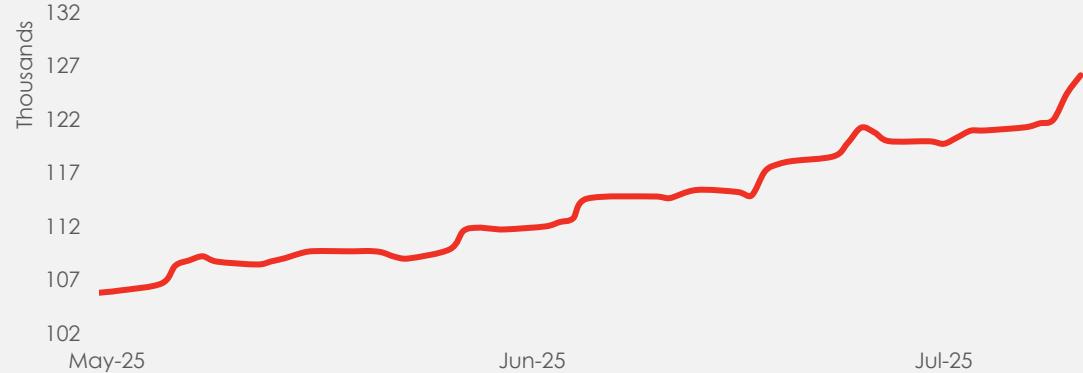
**Top Five Traded Value**

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