

## Equities Market Summary

Today, the Nigerian Stock Exchange Market closed on a slightly positive note following share price appreciation in MTNN (+9.99%) and DANGCEM (+3.05%). As a result, the benchmark All-Share Index (NGX-ASI) rose by 1.99% to close at 137,912.87 points. Year to date returns rose to 33.99%, while market capitalisation closed at N87.19tn. Activity level in the market improved with the total value and volume of stocks traded rising by 34.14% and 20.74% to settle at N30.63bn and 940.80mn units, respectively.

## Corporate Announcements

- Industrial & Medical Gases PLC Releases unaudited Financial Statement for the period ended 30 June, 2025.
- Transnational Corporation PLC releases Q2-2025 Financial Statement.
- Ecobank Transnational Incorporated releases Q2-2025 Financial Statement.
- E-Tranzact International PLC releases Q2-2025 Financial Statement.

## Top Five Gainers

The top Five (5) gainers out of Forty-Seven (47) stocks that appreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
THOMASWY	2.90	3.19	10.00%
LEARNAFRCA	6.30	6.93	10.00%
HMCALL	4.30	4.73	10.00%
BERGER	31.00	34.10	10.00%
ELLAHLAKES	8.91	9.8	9.99%

## Top Five Losers

The top Five (5) losers out of Twenty-Five (25) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
ABBEYBDS	8.00	7.20	(10.00%)
NNFM	103.50	93.15	(10.00%)
VITAFOAM	87.85	79.10	(9.96%)
IMG	41.80	37.65	(9.93%)
INTBREW	16.20	15.05	(7.10%)

## NGX ASI Performance Indicators

The market was bullish with the ASI rising by 1.99% to close at 137,912.87 points.

Headline	Value	1 Day Change	YTD
NGX ASI	137,912.87	1.99%	33.99%
Mkt. Cap (N'bn)	87,191.43	1.99%	38.92%
Mkt. Cap (\$'mn)	56,831.52	1.99%	39.07%
Value (N'mn)	30,626.80	34.14%	N/A
Value (\$'mn)	0.61	20.74%	
Volume (units 'mn)	940.80	20.74%	
Deals	28,358.00	(23.85%)	
Market Breadth	1.9x	N/A	

## Top Five Traded Volume

FIDELITYBK recorded the highest traded volume.

Symbol	Closing Price (N)	Daily Volume (Units)
FIDELITYBK	20.50	111,265,143.00
ROYALEX	1.40	74,075,425.00
JAIZBANK	3.97	60,856,087.00
UNIVINSURE	0.77	38,281,244.00
ACCESSCORP	27.20	36,813,225.00

## Top Five Traded Value

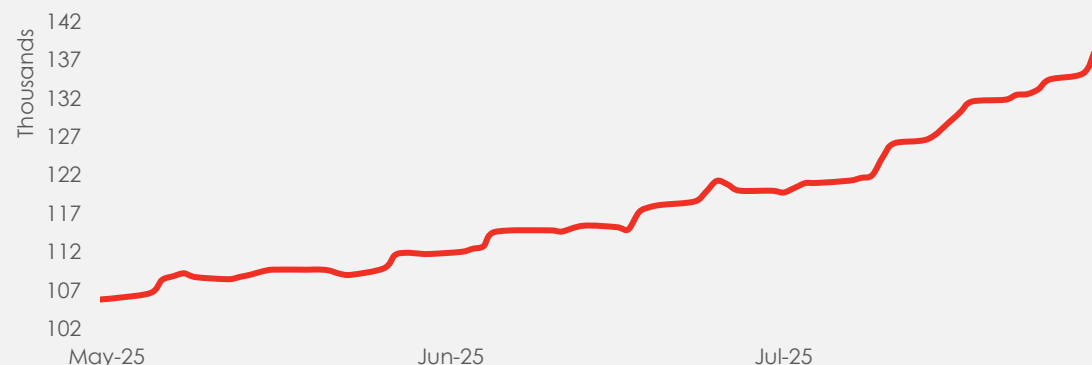
MTNN recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
MTNN	451.60	3,594,958,468.10
OKOMUOIL	1,050.00	3,017,152,862.40
GTCO	98.00	2,608,394,526.80
FIDELITYBK	20.50	2,334,618,499.00
STANBIC	101.00	1,374,488,604.90

## NGX ASI Performance Indicators

### Nigerian Exchange All-Share Index (NGX)

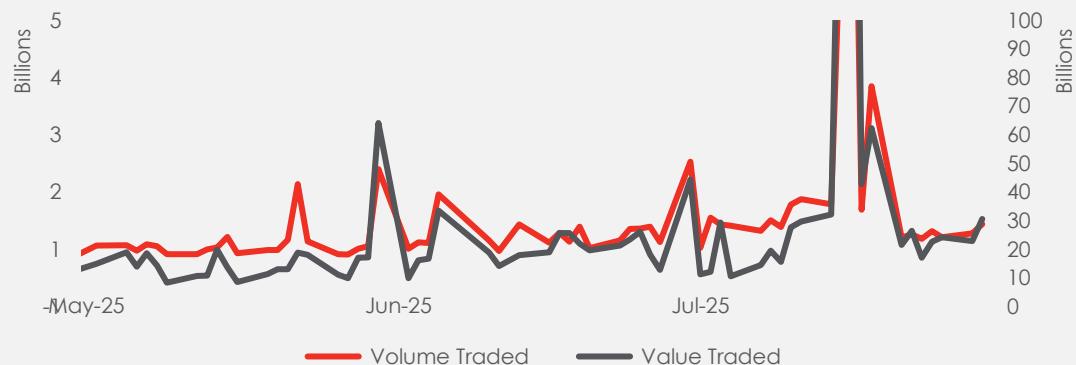
NGX-ASI up 1.99% to close at 137,912.87



## Trading Activity

### Trade Activities

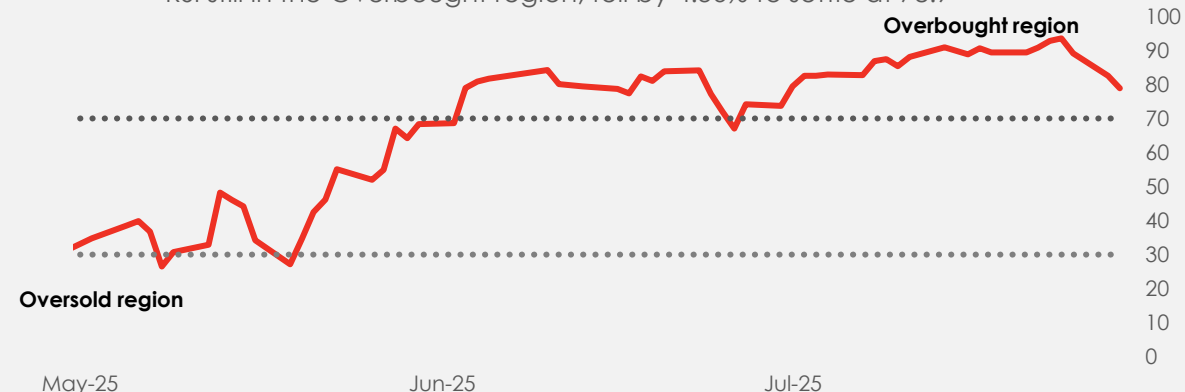
Market activity improved with the total value and volume of stocks traded rising by 34.14% and 20.74% respectively.



## Relative Strength Index (RSI)

### Technical Indicator of Market Position: Relative Strength Index (RSI) on NGX-ASI

RSI still in the Overbought region, fell by 4.36% to settle at 78.9



## 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	1.2%	22.8%	45.0%	1.7	6.8%
Consumer	(0.8%)	10.4%	68.1%	n.a	0.7%
Industrial	1.2%	28.5%	30.9%	13.2	3.9%
Insurance	1.7%	24.0%	30.4%	6.4	3.4%
Oil & Gas	(0.2%)	0.5%	(9.7%)	7.9	3.8%
Mkt. Avg. P/E	8.0		Mkt. Avg. Div. Yid		3.2%

### Global Equities Market

U.S. stocks edged higher on Tuesday as investors digested more corporate earnings releases and key economic data while the Federal Reserve meets.

Index	Current	1 Day Change	Week to Date Change	% Δ YTD
S&P 500	6,403.00	0.20%	0.20%	8.90%
Dow Jones	44,778.60	(0.10%)	(0.30%)	5.30%
Nasdaq	21,214.70	0.20%	0.50%	9.90%
FTSE 100	9,142.10	0.70%	0.20%	11.90%
NIKKEI	40,674.60	(0.80%)	(1.90%)	2.00%

### Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bullish with Seven (7) Indices rising northward.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	309.50	(0.10%)	12.10%	n.a.	7.00%
Egypt	34,112.10	0.10%	14.70%	8.10	2.50%
Ghana	6,645.00	0.00%	35.90%	5.80	2.90%
Kenya	161.6	0.60%	30.80%	7.30	6.80%
Mauritius	2,412.40	0.30%	0.40%	6.50	4.80%
Morocco	447.9	(0.50%)	28.90%	n.a	2.30%
MSCI FM	675.3	0.50%	26.80%	n.a	3.80%
South Africa	99,456.30	0.80%	18.30%	17.30	3.30%
Tunisia	11,836.20	(0.20%)	18.90%	26.90	1.90%
Zimbabwe	44,295,060.00	1.40%	(9.00%)	na	6.50%
Nigeria (NGX)	137,912.87	1.99%	33.99%	8.00	3.00%

### Global Fixed Income Market

We observed mixed sentiments in the Global Fixed Income Market.

Index	Current	1 Day Change	Week to Date Change
US-10Y	4.4	(0.30%)	(0.10%)
UK-10Y	4.6	(0.10%)	0.00%
JP-10Y	1.6	0.10%	(0.30%)
DE-10Y	2.7	0.10%	(0.20%)

### Global Currency Market

The US Dollar recorded mixed performances against other major global currencies.

Currencies	Current	1 Day Change	Week to Date Change	% Δ YTD
GBP/USD	1.3	(0.30%)	(0.90%)	6.40%
EUR/USD	1.2	(0.40%)	(1.70%)	11.40%
JPY/USD	0.0	0.00%	0.60%	(5.50%)
CNY/USD	0.1	0.00%	0.10%	(1.60%)

### Key:

YTD – Year to Date change