

**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**

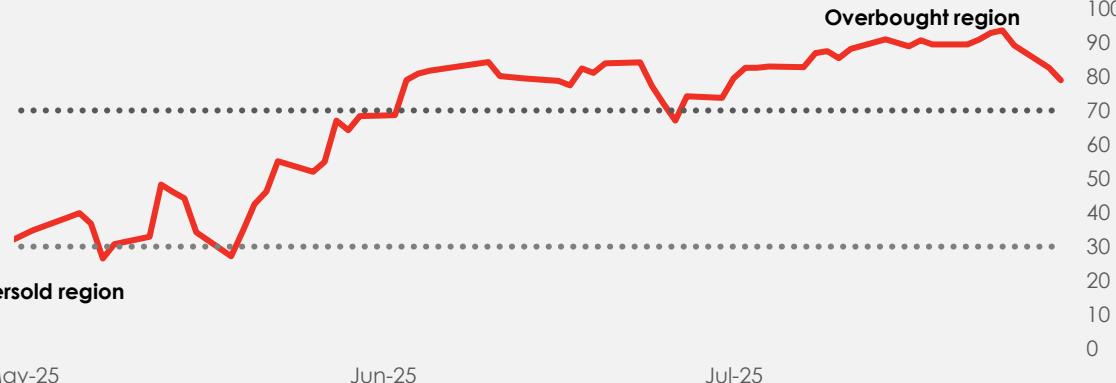
Market activity improved with the total value and volume of stocks traded rising by 34.14% and 20.74% respectively.



**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			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