

## Equity Market Summary

Today, the Nigerian Stock Exchange Market closed on a negative note following share price depreciation in BUACEMEN (-9.96%) and MTNN (-2.25%). As a result, the benchmark All-Share Index (NGX-ASI) fell by 0.87% to close at 140,332.44 points. Year to date returns weakened to settle at 36.34%, while market capitalisation closed at N88.78tn. Activity level in the market was mixed with the total value of stocks traded rising by 2.64% to settle at N12.88bn. Meanwhile, the total volume of stocks traded fell by 19.53% to settle at 573.75mn units.

## Corporate Announcements

- Trans-Nationwide Express Plc. – Q2-2025 Financial Statement

## Top Five Gainers

The top Five (5) gainers out of Fourteen (14) stocks that appreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
NSLTECH	0.96	1.05	9.38%
OMATEK	1.36	1.44	5.88%
CHAMS	2.60	2.73	5.00%
CUSTODIAN	38.05	39.90	4.86%
ELLAHLAKES	14.90	15.4	3.36%

## Top Five Losers

The top Five (5) losers out of Forty-Three (43) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
INTENEGINS	3.60	3.24	(10.00%)
THOMASWY	3.70	3.33	(10.00%)
UPL	7.00	6.30	(10.00%)
VERITASKAP	2.00	1.80	(10.00%)
BUACEMENT	168.60	151.80	(9.96%)

## NGX ASI Performance Indicators

The market was bearish with the ASI falling by 0.87% to close at 140,332.44 points.

Headline	Value	1 Day Change	YTD
NGX ASI	140,332.44	(0.87%)	36.34%
Mkt. Cap (N'bn)	88,783.91	(0.87%)	41.46%
Mkt. Cap (\$'mn)	57,774.39	(0.87%)	41.37%
Value (N'mn)	12,876.66	2.64%	N/A
Value (\$'mn)	0.37	(19.53%)	
Volume (units 'mn)	573.75	(19.53%)	
Deals	25,881.00	(8.63%)	
Market Breadth	0.3x	N/A	

## Top Five Traded Volume

FIDELITYBK recorded the highest traded volume.

Symbol	Closing Price (N)	Daily Volume (Units)
FIDELITYBK	20.75	96,067,692.00
VERITASKAP	1.80	36,602,436.00
UNIVINSURE	1.11	32,932,439.00
ACCESSCORP	26.95	30,331,754.00
AIICO	3.92	20,649,855.00

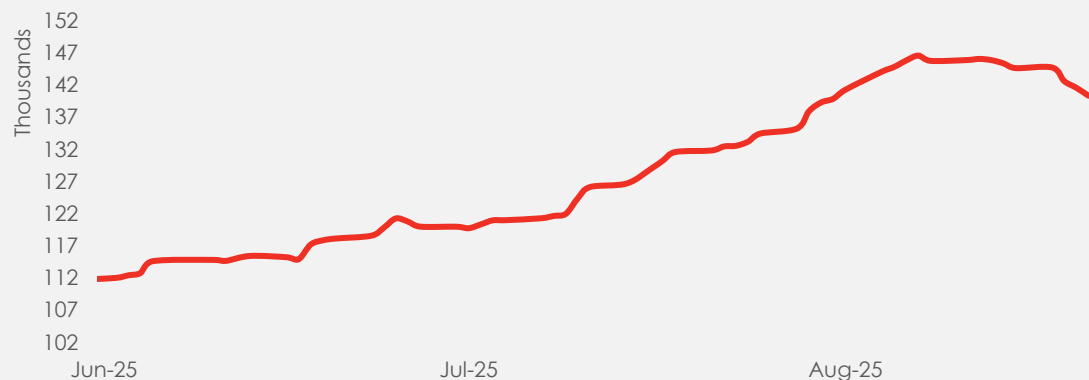
## Top Five Traded Value

FIDELITYBK recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
FIDELITYBK	20.75	1,991,369,585.95
MTNN	435.00	1,197,859,329.30
STANBIC	94.50	1,071,107,115.10
GTCO	92.75	831,632,713.10
ACCESSCORP	26.95	819,078,975.05

### NGX ASI Performance Indicators

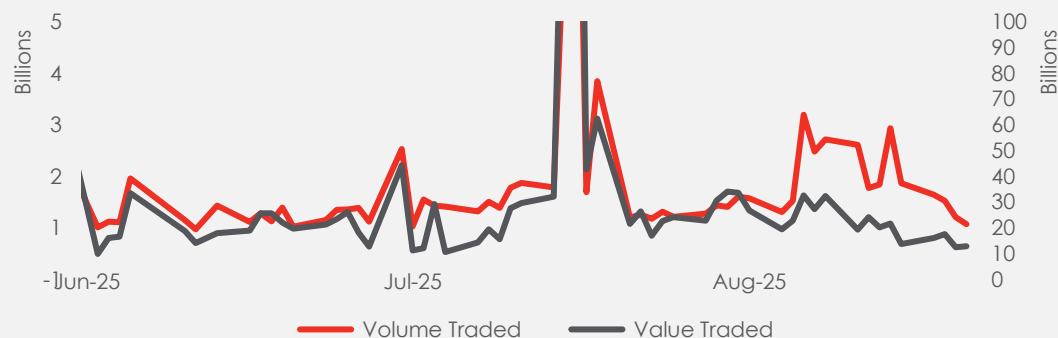
**Nigerian Exchange All-Share Index (NGX)**  
NGX-ASI down 0.87% to close at 140,332.44



### Trading Activity

#### Trade Activities

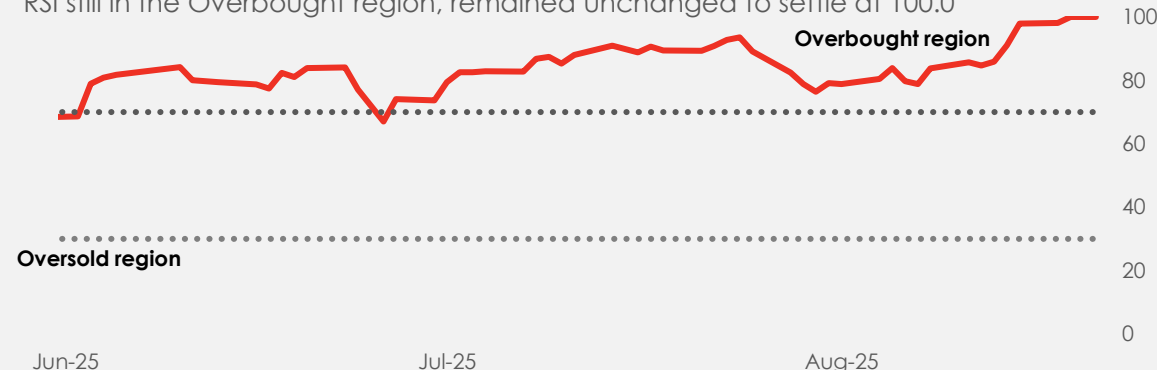
Market activity was mixed with the total value of stocks traded rising by 2.64%. Meanwhile, the total volume of stocks traded fell by 19.53%



### Relative Strength Index (RSI)

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

RSI still in the Overbought region, remained unchanged to settle at 100.0



### Sector Performance

On a sectorial level, performance was bearish as Three (3) out of the Five (5) sectors under our coverage closed in the red zone while one (1) closed flat.

Sectors	1 Day Change	Month To Date Change	YTD	P/E(x)	Div. Yield
Banks	0.5%	(4.7%)	41.5%	1.7	6.9%
Consumer	0.0%	8.7%	83.9%	n.a	0.7%
Industrial	(4.0%)	2.3%	39.9%	14.7	3.6%
Insurance	(4.7%)	36.2%	68.7%	5.1	2.6%
Oil & Gas	(0.1%)	(3.8%)	(12.1%)	11.5	4.1%
Mkt. Avg. P/E	7.4		Mkt. Avg. Div. Yid	3.1%	

### Global Equities Market

US stocks fell today after the release of weak labor market data raised concerns about the health of the US economy, ahead of the start of the Federal Reserve's Jackson Hole symposium.

Index	Current	% Δ DoD	% Δ WTD	% Δ YTD
S&P 500	6,371.10	(0.40%)	(1.20%)	8.30%
Dow Jones	44,799.60	(0.30%)	(0.30%)	5.30%
Nasdaq	21,117.30	(0.30%)	(2.30%)	9.40%
FTSE 100	9,282.50	(0.10%)	1.60%	13.60%
NIKKEI	42,610.20	(0.60%)	(1.80%)	6.80%

### Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was mixed as Four (4) Indices fell and Four (4) indices rose.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	318.30	0.30%	15.30%	n.a.	7.00%
Egypt	35,622.30	(0.30%)	19.80%	8.10	2.40%
Ghana	7,294.10	(0.10%)	49.20%	7.50	2.80%
Kenya	168.90	0.70%	36.80%	7.20	6.50%
Mauritius	2,459.30	0.10%	2.30%	6.60	4.80%
Morocco	455.5	0.00%	31.10%	n.a	2.20%
MSCI FM	697.3	(0.10%)	30.90%	n.a	3.60%
South Africa	101,556.20	0.50%	20.80%	14.90	3.30%
Tunisia	11,793.40	0.00%	18.50%	26.60	1.90%
Zimbabwe	46,114,790.00	0.00%	(5.30%)	na	6.20%
Nigeria (NGX)	140,332.44	(0.87%)	36.34%	7.41	3.00%

### Global Fixed Income Market

We observed bearish sentiments in the Global Fixed Income Market.

Index	Current	% Δ DoD	% Δ WTD
US-10Y	4.3	0.30%	0.10%
UK-10Y	4.7	0.40%	0.20%
JP-10Y	1.6	0.00%	0.30%
DE-10Y	2.8	0.30%	(0.30%)

### Global Currency Market

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

Currencies	Current	% Δ DoD	% Δ WTD	% Δ YTD
GBP/USD	1.3	(0.20%)	(0.90%)	7.30%
EUR/USD	1.2	(0.20%)	(0.70%)	12.30%
JPY/USD	0.0	0.40%	0.50%	(5.90%)
CNY/USD	0.1	0.10%	-0.10%	(1.60%)

### Key:

YTD – Year to Date change