

Equity Market Summary

Today, the Nigerian Stock Exchange Market closed on a positive note following share price appreciation in DANGCEM (+9.22%) and BUAFOODS (+9.41%). As a result, the benchmark All-Share Index (NGX-ASI) rose by 1.99% to close at 144,071.78 points. Year to date returns rose to 39.98%, while market capitalisation closed at N91.15tn. Activity level in the market declined with the total value and volume of stocks traded declining by 27.48% and 24.84% to settle at N19.47bn and 811.10mn units.

Corporate Actions

- Consolidated Hallmark Holdings PLC: Corporate Actions-Interim Dividend declaration of 10 kobo.
- International Breweries PLC: Quarter 2- Financial Statement for 2025.
- Deap Capital Management & Trust PLC- Unaudited financial statement for H1-2025.

Top Five Gainers

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

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
UPDC	5.40	5.94	10.00%
ROYALEX	1.50	1.65	10.00%
LASACO	2.60	2.86	10.00%
UACN	88.30	97.10	9.97%
SOVRENINS	1.71	1.88	9.94%

Top Five Losers

The top Five (5) losers out of Twenty-two (22) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
ACADEMY	11.00	9.90	(10.00%)
TRANSPower	320.00	288.00	(10.00%)
JOHNHOLT	7.30	6.60	(9.59%)
TOTAL	705.00	640.00	(9.22%)
ETI	37.45	34.00	(9.21%)

NGX ASI Performance Indicators

The market was bullish with the ASI rising by 1.99% to close at 144,071.78 points.

Headline	Value	1 Day Change	YTD
NGX ASI	144,071.78	1.99%	39.98%
Mkt. Cap (N'bn)	91,149.78	1.99%	45.23%
Mkt. Cap (\$'mn)	59,429.58	1.99%	45.42%
Value (N'mn)	19,471.77	(27.48%)	N/A
Value (\$'mn)	0.53	(24.84%)	
Volume (units 'mn)	811.10	(24.84%)	
Deals	35,963.00	4.28%	
Market Breadth	2.0x	N/A	

Top Five Traded Volume

FCMB recorded the highest traded volume.

Symbol	Closing Price (N)	Daily Volume (Units)
FCMB	11.85	84,948,738.00
UNIVINSURE	0.76	82,511,819.00
FIDELITYBK	21.20	45,429,308.00
AIICO	2.40	40,148,535.00
VERITASKAP	1.52	39,769,779.00

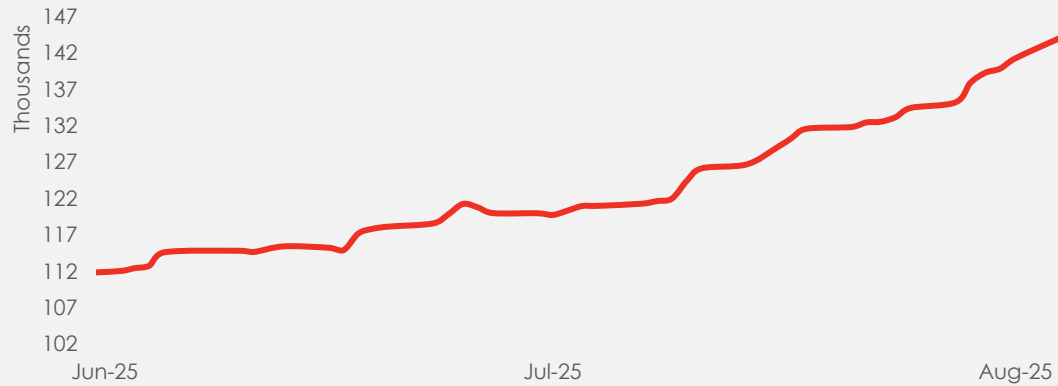
Top Five Traded Value

GTCO recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
GTCO	100.00	2,764,960,301.55
ZENITHBANK	76.90	1,818,638,220.75
DANGCEM	577.00	1,583,571,883.80
FCMB	11.85	979,415,953.30
FIDELITYBK	21.20	955,597,981.00

NGX ASI Performance Indicators

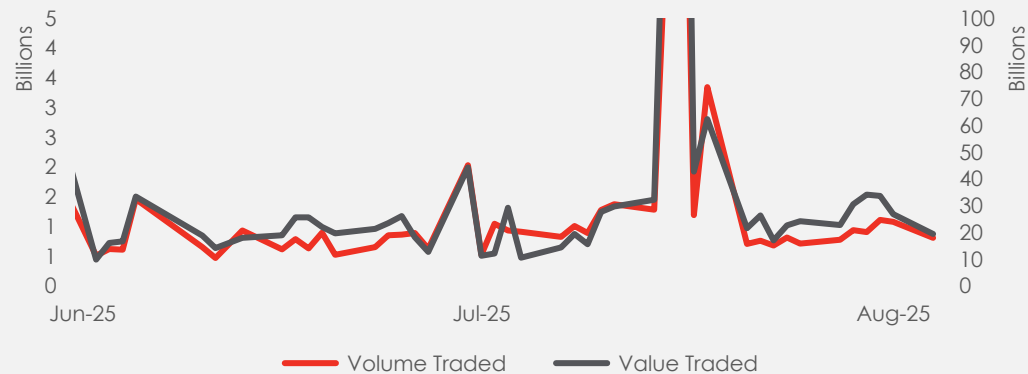
Nigerian Exchange All-Share Index (NGX)
NGX-ASI up 1.99% to close at 144,071.78



Trading Activity

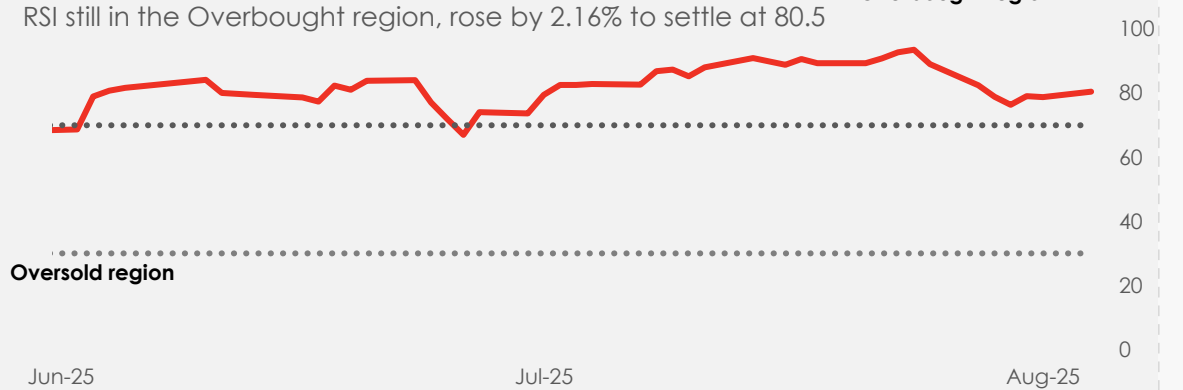
Trade Activities

Market activity declined with the total value and volume of stocks traded declining by 27.48% and 24.84%.



Relative Strength Index (RSI)

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



Sector Performance

On a sectorial level, performance was bullish as Four (4) 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	0.1%	0.6%	49.4%	1.8	6.6%
Consumer	4.9%	6.6%	80.4%	n.a	0.7%
Industrial	5.7%	9.4%	49.6%	14.3	3.4%
Insurance	3.4%	3.1%	27.8%	6.2	3.4%
Oil & Gas	(1.1%)	(2.8%)	(11.2%)	11.7	3.9%
Mkt. Avg. P/E	7.6		Mkt. Avg. Div. Yid		3.1%

Global Equities Market

US stocks rose on Monday, rebounding following the payrolls-inspired sell-off at the end of the prior week, with investors buoyed by the prospect of lower interest rates.

Index	Current	1 Day Change	Week to Date Change	% Δ YTD
S&P 500	6,311.40	1.20%	1.20%	7.30%
Dow Jones	44,006.90	1.00%	1.00%	3.40%
Nasdaq	20,982.90	1.60%	1.60%	8.70%
FTSE 100	9,104.10	0.40%	0.40%	11.40%
NIKKEI	40,290.70	(1.20%)	(1.20%)	1.00%

Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bullish as Five (5) Indices rose.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	310.50	(0.80%)	12.50%	n.a.	7.20%
Egypt	34,704.50	1.30%	16.70%	8.30	2.40%
Ghana	7,016.60	0.30%	43.50%	6.00	2.80%
Kenya	158.00	(0.60%)	28.00%	7.20	7.00%
Mauritius	2,426.10	0.10%	1.00%	6.50	4.80%
Morocco	454.6	(0.40%)	30.90%	n.a	2.20%
MSCI FM	663.4	(0.10%)	24.50%	n.a	3.80%
South Africa	98,766.20	1.00%	17.40%	14.50	3.40%
Tunisia	11,848.10	0.00%	19.00%	26.90	1.90%
Zimbabwe	43,964,500.00	0.00%	(9.70%)	na	6.50%
Nigeria (NGX)	144,071.78	1.99%	39.98%	7.56	3.00%

Global Fixed Income Market

We observed bullish sentiments in the Global Fixed Income Market.

Index	Current	1 Day Change	Week to Date Change
US-10Y	4.2	0.00%	0.00%
UK-10Y	4.5	(0.20%)	(0.20%)
JP-10Y	1.5	(0.40%)	(0.40%)
DE-10Y	2.6	(0.40%)	(0.40%)

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	0.40%	0.40%	6.50%
EUR/USD	1.2	0.00%	0.00%	11.90%
JPY/USD	0.0	(0.30%)	(0.30%)	(6.50%)
CNY/USD	0.1	(0.20%)	(0.20%)	(1.70%)

Key:

YTD – Year to Date change