

**Equity Market Summary**

Today, the Nigerian Stock Exchange Market closed on a positive note following share price appreciation in BUAFOODS (+8.70%) and GUINNESS(+9.98%). As a result, the benchmark All-Share Index (NGX-ASI) rose by 0.52% to close at 146,570.71 points. Year to date returns rose to 42.40%, while market capitalisation closed at N92.73tn. Activity level in the market declined with the total value and volume of stocks traded falling by 16.45% and 26.51% to settle at N27.26bn and 1.93bn units.

**Corporate Announcement**

- Aluminium Extrusion Plc- QUARTER 2 FINANCIAL STATEMENT FOR 2025

**Top Five Gainers**

The top Five (5) gainers out of Forty-four (44) stocks that appreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
UPL	5.10	5.61	10.00%
MANSARD	12.10	13.31	10.00%
CORNERST	5.30	5.83	10.00%
AIICO	2.90	3.19	10.00%
GUINNESS	128.75	141.6	9.98%

**Top Five Losers**

The top Five (5) losers out of Thirty (30) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
CHAMS	3.22	2.90	(9.94%)
AUSTINLAZ	2.34	2.11	(9.83%)
CAVERTON	7.05	6.37	(9.65%)
UACN	90.00	81.50	(9.44%)
JOHNHOLT	7.95	7.20	(9.43%)

**NGX ASI Performance Indicators**

The market was bullish with the ASI rising by 0.52% to close at 146,570.71 points.

Headline	Value	1 Day Change	YTD
NGX ASI	146,570.71	0.52%	42.40%
Mkt. Cap (N'bn)	92,730.77	0.52%	47.75%
Mkt. Cap (\$'mn)	60,432.97	0.52%	47.88%
Value (N'mn)	27,261.91	(16.45%)	N/A
Value (\$'mn)	1.29	(26.51%)	
Volume (units 'mn)	1,983.02	(26.51%)	
Deals	35,291.00	0.44%	
Market Breadth	1.6x	N/A	

**Top Five Traded Volume**

LINKASSURE recorded the highest traded volume.

Symbol	Closing Price (N)	Daily Volume (Units)
LINKASSURE	1.88	372,401,919.00
PRESTIGE	1.66	249,326,942.00
VERITASKAP	1.99	181,866,900.00
STERLINGNG	7.80	121,018,625.00
LASACO	3.56	58,721,300.00

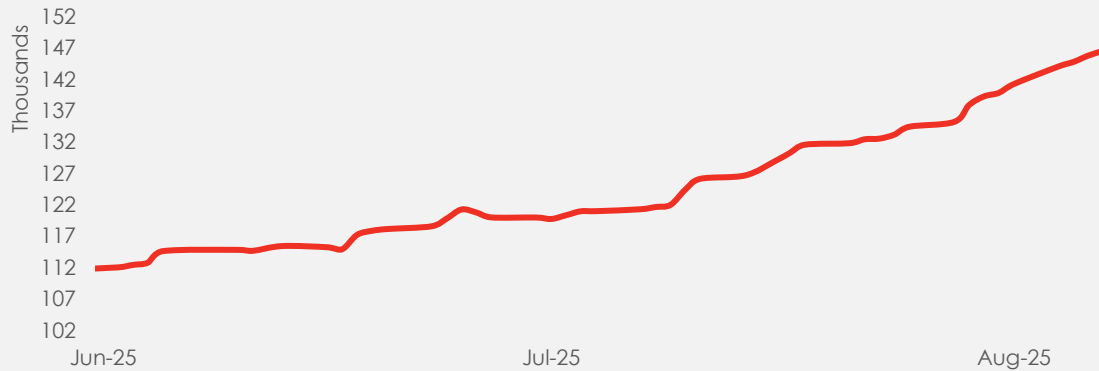
**Top Five Traded Value**

GTCO recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
GTCO	99.95	2,909,776,459.15
ZENITHBANK	74.70	2,835,387,014.30
DANGCEM	577.00	2,745,731,312.40
OKOMUOIL	1,050.00	1,453,062,443.20
ACCESSCORP	27.40	1,367,199,025.30

**NGX ASI Performance Indicators**

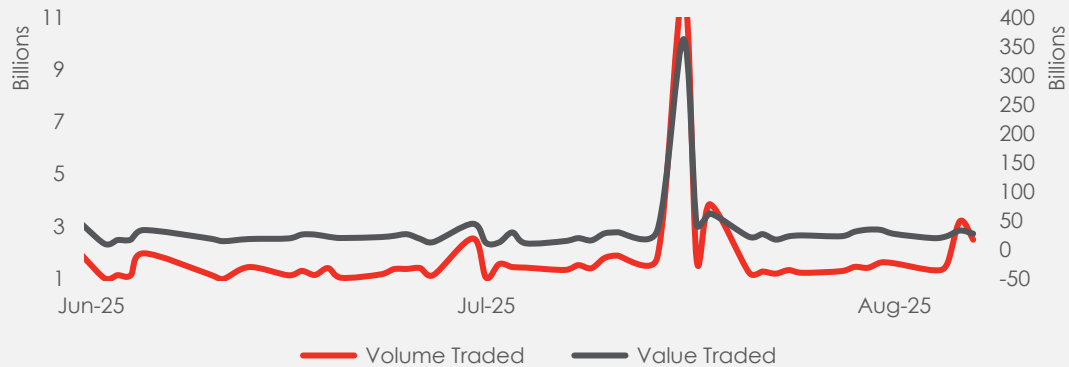
**Nigerian Exchange All-Share Index (NGX)**  
NGX-ASI up 0.52% to close at 146,570.71



**Trading Activity**

**Trade Activities**

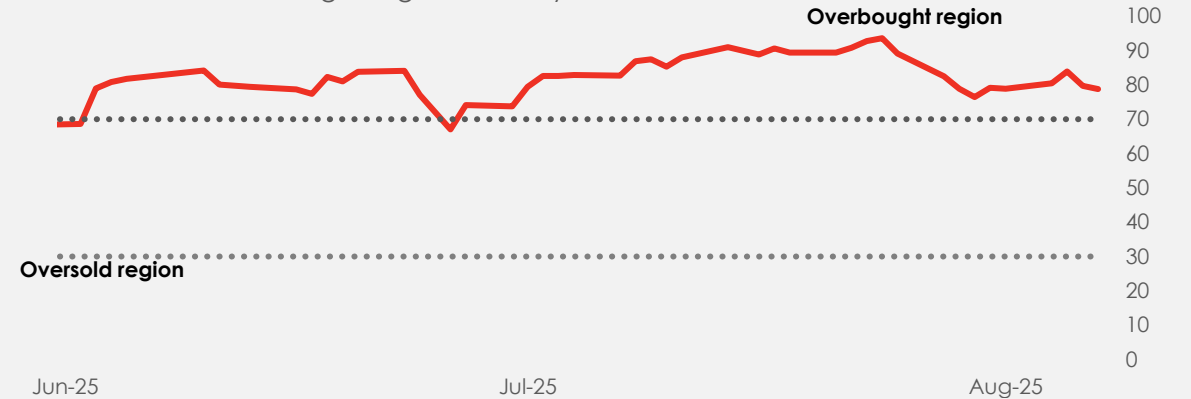
Market activity reduced with the total value and volume of stocks traded declining by 16.45% and 26.51%.



**Relative Strength Index (RSI)**

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

RSI still in the Overbought region, it fell by 0.11% to settle at 78.8



**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	0.2%	(0.4%)	47.9%	1.8	6.6%
Consumer	4.1%	10.0%	86.2%	n.a	0.7%
Industrial	(1.7%)	14.3%	56.3%	15.8	3.2%
Insurance	8.8%	32.5%	64.1%	4.9	2.7%
Oil & Gas	(0.9%)	(1.9%)	(10.3%)	11.7	3.8%
Mkt. Avg. P/E	7.7		Mkt. Avg. Div. Yid		3.0%

### Global Equities Market

US stocks rose on Thursday, buoyed by a relatively solid earnings season as President Donald Trump's latest tariff barrage takes effect.

Index	Current	1 Day Change	Week to Date Change	% Δ YTD
S&P 500	6,378.50	0.50%	2.30%	8.40%
Dow Jones	44,266.40	0.20%	1.60%	4.00%
Nasdaq	21,374.70	1.00%	3.50%	10.70%
FTSE 100	9,108.00	(0.60%)	0.40%	11.40%
NIKKEI	41,059.20	0.60%	0.60%	2.90%

### Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bullish as Ten (10) Indices rose.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	312.00	0.40%	13.00%	n.a.	7.10%
Egypt	35,809.40	0.90%	20.40%	8.50	2.30%
Ghana	7,269.40	1.40%	48.70%	6.10	2.70%
Kenya	159.20	0.50%	29.00%	7.20	6.90%
Mauritius	2,435.30	0.10%	1.30%	6.60	4.80%
Morocco	457.1	0.50%	31.60%	n.a	2.20%
MSCI FM	681.7	0.90%	28.00%	n.a	3.70%
South Africa	100,851.20	0.70%	19.90%	14.90	3.30%
Tunisia	11,820.90	0.60%	18.80%	26.80	1.90%
Zimbabwe	45,733,000.00	(0.10%)	(6.00%)	na	6.30%
Nigeria (NGX)	146,570.71	0.52%	42.40%	7.70	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	(0.10%)	0.00%
UK-10Y	4.5	0.20%	0.20%
JP-10Y	1.5	(0.10%)	(0.60%)
DE-10Y	2.6	(0.10%)	(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	0.50%	1.10%	7.20%
EUR/USD	1.2	(0.20%)	0.40%	12.40%
JPY/USD	0.0	0.00%	(0.10%)	(6.30%)
CNY/USD	0.1	0.00%	(0.20%)	(1.60%)

#### Key:

YTD – Year to Date change