

## Equity Market Summary

Today, the Nigerian Stock Exchange Market closed on a negative note following share price depreciation in MTNN (-4.17%) and BUACEMEN (-3.66%). As a result, the benchmark All-Share Index (NGX-ASI) fell by 0.56% to close at 145,756.62 points. Year to date returns weakened to 41.61%, while market capitalisation closed at N92.21tn. Activity level in the market improved with the total value and volume of stocks traded rising by 18.94% and 11.74% to settle at N32.42bn and 2.21bn units.

## Corporate Announcement

- Stanbic IBTC ETF 40 – Announces N12.44 interim dividend
- ASO Savings and Loans Plc- Q2-2025 Financial Statement

## Top Five Gainers

The top Five (5) gainers out of Forty-One (41) stocks that appreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
UNIVINSURE	1.00	1.10	10.00%
UNIONDICON	9.00	9.90	10.00%
CHAMPION	13.10	14.41	10.00%
GUINNESS	141.60	155.75	9.99%
MANSARD	13.31	14.64	9.99%

## Top Five Losers

The top Five (5) losers out of Twenty-Seven (27) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
ABBEYBDS	6.99	6.30	(9.87%)
CUSTODIAN	44.20	40.45	(8.48%)
DEAPCAP	1.46	1.35	(7.53%)
NPFMCRFBK	3.45	3.20	(7.25%)
OMATEK	1.45	1.35	(6.90%)

## NGX ASI Performance Indicators

The market was bearish with the ASI falling by 0.56 to close at 145,756.62 points.

Headline	Value	1 Day Change	YTD
NGX ASI	145,756.62	(0.56%)	41.61%
Mkt. Cap (N'bn)	92,214.62	(0.56%)	46.92%
Mkt. Cap (\$'mn)	60,124.36	(0.56%)	47.12%
Value (N'mn)	32,424.93	18.94%	N/A
Value (\$'mn)	1.44	11.74%	
Volume (units 'mn)	2,215.78	11.74%	
Deals	35,036.00	(0.72%)	
Market Breadth	1.5x	N/A	

## Top Five Traded Volume

LINKASSURE recorded the highest traded volume.

Symbol	Closing Price (N)	Daily Volume (Units)
LINKASSURE	2.06	585,560,232.00
UNIVINSURE	1.10	213,193,958.00
AIICO	3.50	178,524,964.00
MBENEFIT	2.92	137,835,817.00
STERLINGNG	8.35	115,270,100.00

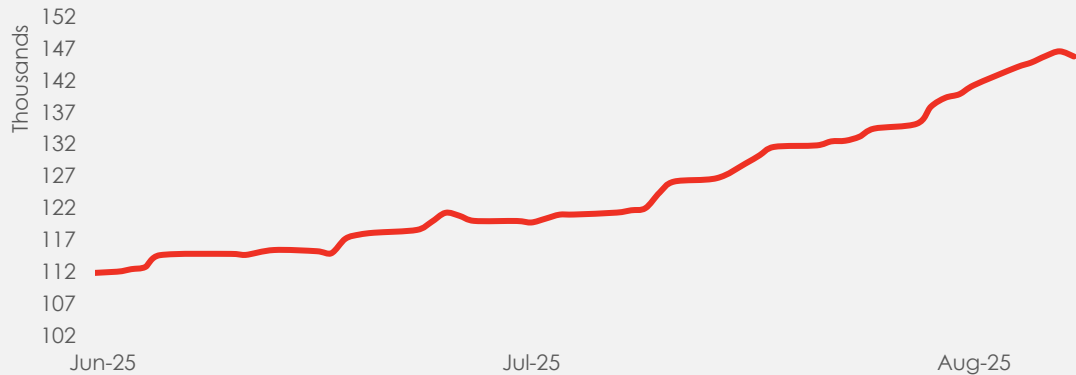
## Top Five Traded Value

DANGCEM recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
DANGCEM	577.00	7,233,162,595.60
ZENITHBANK	74.65	2,131,223,555.15
MTNN	460.00	1,932,443,100.50
UBA	48.60	1,747,041,935.15
ACCESSCORP	27.60	1,517,954,841.60

**NGX ASI Performance Indicators**

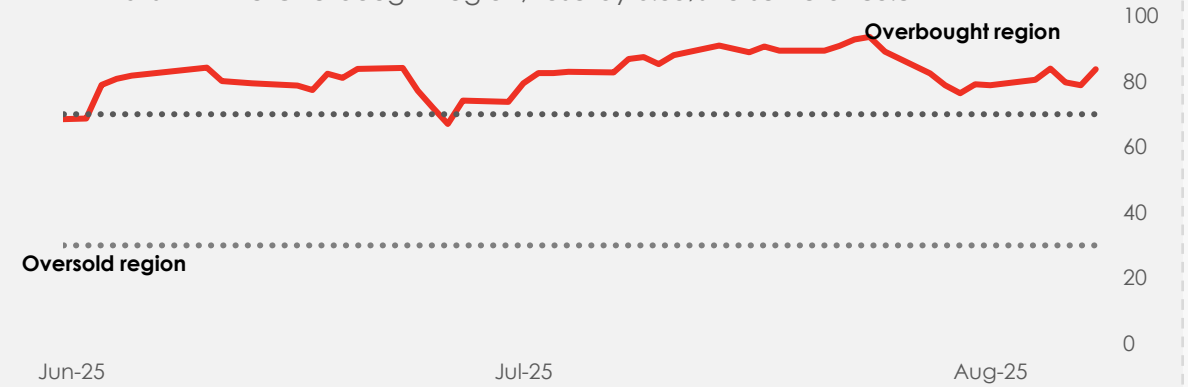
**Nigerian Exchange All-Share Index (NGX)**  
NGX-ASI down 0.56% to close at 145,756.62



**Relative Strength Index (RSI)**

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

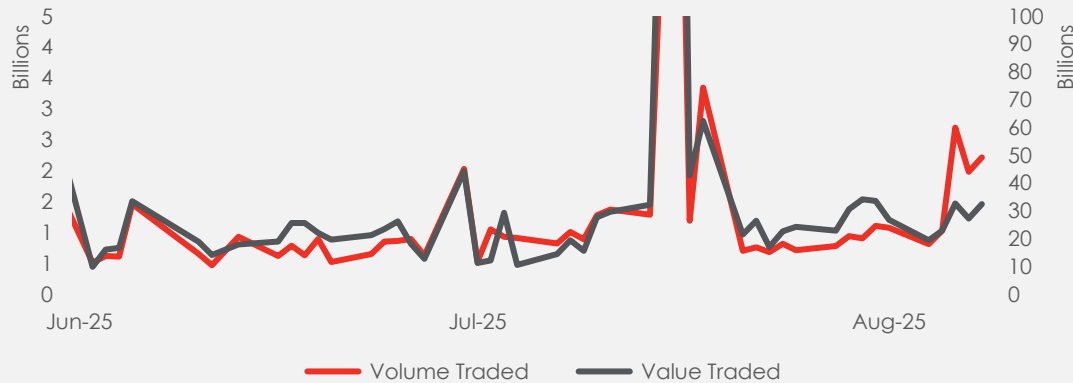
RSI still in the Overbought region, rose by 6.35% to settle at 83.8



**Trading Activity**

**Trade Activities**

Market activity improved with the total value and volume of stocks traded climbing by 18.94% and 11.74%.



**Sector Performance**

On a sectorial level, performance was mixed as Two (2) out of the Five (5) sectors under our coverage closed in the red zone.

Sectors	1 Day Change	Month To Date Change	YTD	P/E(x)	Div. Yield
Banks	(0.6%)	(1.0%)	47.1%	1.8	6.7%
Consumer	0.1%	10.2%	86.4%	n.a	0.6%
Industrial	(1.5%)	12.5%	53.9%	15.8	3.3%
Insurance	6.5%	41.1%	74.8%	4.9	2.5%
Oil & Gas	0.0%	(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 edged higher today as investors digested Trump's new selection to temporarily fill a vacancy on the Fed's Board of Governors and assessed an ebbing stream of corporate earnings.

Index	Current	1 Day Change	Week to Date Change	% Δ YTD
S&P 500	6,376.70	0.60%	2.20%	8.40%
Dow Jones	44,247.90	0.60%	1.50%	4.00%
Nasdaq	21,394.60	0.70%	3.60%	10.80%
FTSE 100	9,087.00	(0.20%)	0.20%	11.20%
NIKKEI	41,820.50	1.90%	0.00%	4.80%

### Pan African Equities Market (ASI)

In the Pan African Equities Market, performance was bullish as Nine (9) Indices rose.

Equities Market	Level	1 Day Change	YTD	P/E (x)	Div. Yld
BRVM	312.40	0.20%	13.20%	n.a.	7.10%
Egypt	35,809.40	0.90%	20.40%	8.60	2.30%
Ghana	7,408.90	1.20%	51.50%	6.30	2.60%
Kenya	161.00	1.10%	30.40%	7.20	6.80%
Mauritius	2,436.50	0.00%	1.40%	6.60	4.80%
Morocco	459	0.40%	32.10%	n.a	2.20%
MSCI FM	686.8	0.70%	28.90%	n.a	3.70%
South Africa	100,951.10	0.30%	20.00%	14.90	3.30%
Tunisia	11,864.10	0.40%	19.20%	26.90	1.90%
Zimbabwe	45,782,580.00	0.10%	(5.90%)	na	6.30%
Nigeria (NGX)	145,756.62	(0.56%)	41.61%	7.69	3.00%

### Global Fixed Income Market

We observed bearish sentiments in the Global Fixed Income Market.

Index	Current	1 Day Change	Week to Date Change
US-10Y	4.3	0.20%	0.00%
UK-10Y	4.6	0.40%	0.50%
JP-10Y	1.5	0.10%	(0.60%)
DE-10Y	2.7	0.50%	0.10%

### Global Currency Market

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

Currencies	Current	1 Day Change	Week to Date Change	% Δ YTD
GBP/USD	1.3	0.00%	1.20%	7.40%
EUR/USD	1.2	(0.10%)	0.60%	12.60%
JPY/USD	0.0	0.40%	0.20%	(6.00%)
CNY/USD	0.1	0.10%	(0.10%)	(1.60%)

### Key:

YTD – Year to Date change