

### Equity Market Summary

Today, the Nigerian Stock Exchange Market closed on a negative note following share price depreciation in TRANSCORP (-2.19%) and WAPCO (-1.75%). As a result, the benchmark All-Share Index (NGX-ASI) fell by 0.38%, closing at 153,676.66 points. Year to date returns weakened to close at 49.31%, while market capitalisation closed at N97.54tn. Activity level in the market climbed with the total value and volume of stocks traded falling by 136.61% and 55.86% to settle at N35.11bn and 705.86mn units respectively.

#### Corporate Announcements:

- Total Energies Marketing Nigeria Plc. – Releases Q3-2025 Financial Statement
- OANDO Nigeria Plc. – Releases Q3-2025 Financial Statement
- Access Holdings Nigeria Plc. - Q3-2025 Financial Statement
- Seplat Nigeria Plc. - Releases Q3-2025 Financial Statement

### Top Five Gainers

The top Five (5) gainers out of Nineteen (19) stocks that appreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
OANDO	42.55	46.80	9.99%
ASOSAVINGS	0.86	0.94	9.30%
AIICO	3.80	4.00	5.26%
MAYBAKER	17.00	17.85	5.00%
DEAPCAP	1.81	1.90	4.97%

### Top Five Losers

The top Five (5) losers out of Thirty-Six (36) stocks that depreciated in the market today.

Symbol	Opening Price (N)	Closing Price (N)	Change (%)
CADBURY	69.50	62.55	(10.00%)
CHAMS	3.90	3.51	(10.00%)
INTBREW	14.00	12.60	(10.00%)
LEARNAFRCA	6.55	5.90	(9.92%)
NAHCO	124.85	113.00	(9.49%)

### NGX ASI Performance Indicators

The market was bearish with the ASI falling by 0.38% to close at 153,676.66 points.

Headline	Value	1 Day Change	YTD
NGX ASI	153,676.66	(0.38%)	49.31%
Mkt. Cap (₦'bn)	97,543.10	(0.38%)	55.41%
Mkt. Cap (\$'mn)	67,530.98	(0.38%)	65.25%
Value (₦'mn)	35,109.83	136.61%	N/A
Value (\$'mn)	24.31	136.61%	
Volume (units 'mn)	705.86	55.86%	
Deals	28,944.00	4.66%	
Market Breadth	0.5x		N/A

### Top Five Traded Volume

WEMABANK recorded the highest traded volume.

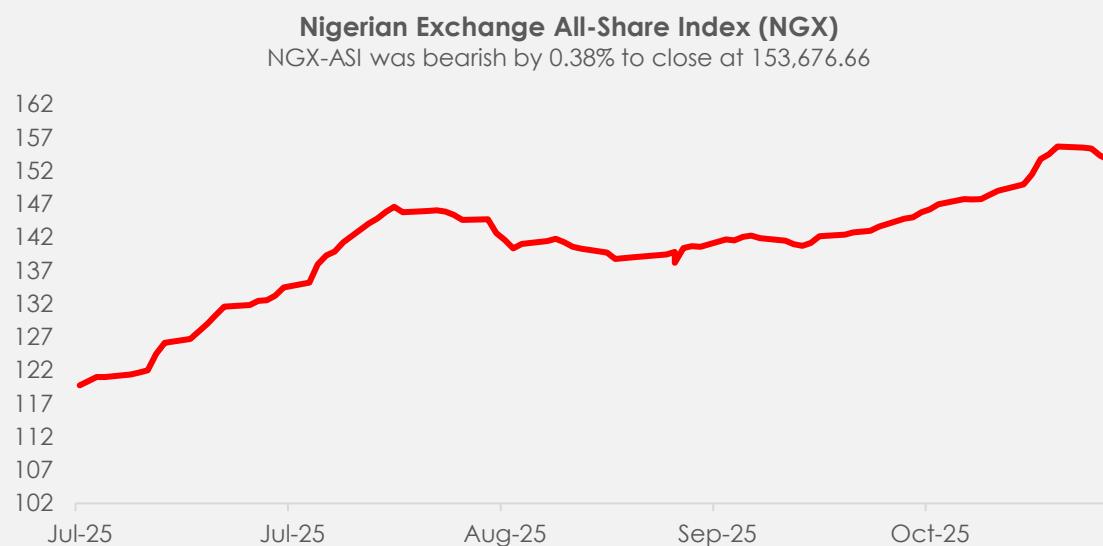
Symbol	Closing Price (N)	Daily Volume (Units)
WEMABANK	20.40	305,735,643.00
GTCO	89.00	97,921,033.00
ASOSAVINGS	0.94	75,382,513.00
CHAMS	3.51	24,570,565.00
AIICO	4.00	16,239,760.00

### Top Five Traded Value

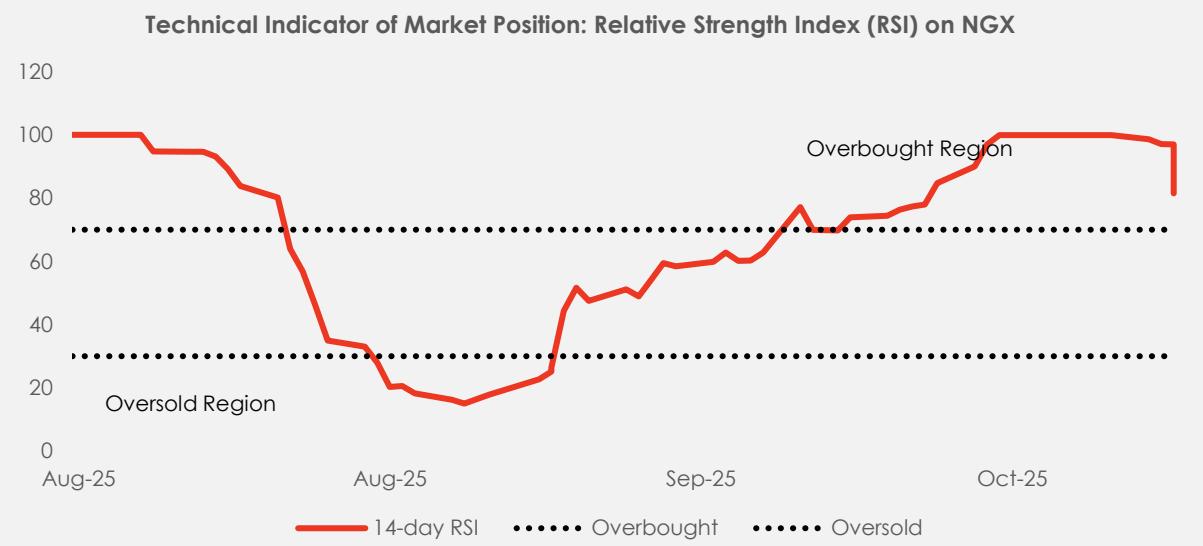
GEREGU recorded the highest traded value.

Symbol	Closing Price (N)	Daily Value (N)
GEREGU	1,141.50	8,766,350,089.20
GTCO	89.00	8,716,781,078.35
WEMABANK	20.40	5,666,622,382.85
ARADEL	782.00	1,500,446,930.90
MTNN	520.10	1,365,949,936.10

**NGX ASI Performance Indicators**



**Relative Strength Index (RSI)**



### Global Equities Market

US stocks were mixed on Thursday as investors digested major tech earnings and the Federal Reserve rate cut decision

Index	Current	1 Day Change	Week-to-Date Change	YTD
S&P 500	6,865.96	2.16%	1.94%	16.74%
Dow Jones	47,915.28	2.78%	2.59%	12.62%
Nasdaq	23,720.25	(5.08%)	(5.65%)	12.89%
FTSE 100	9,747.45	1.78%	3.66%	19.26%
NIKKEI	51,325.61	5.52%	4.35%	28.65%

### Pan African Equities Market (ASI)

In the Pan-African equities market, performance was mixed with 4 indices rising.

Equities Market	Level	1 Day Change	YTD
BRVM	343.84	1.82%	24.75%
Egypt	38,267.80	1.54%	28.67%
Ghana	8,351.36	(1.09%)	70.82%
Morocco	451.43	1.13%	29.96%
MSCI FM	1,383.75	(0.39%)	39.21%
South Africa	109,669.78	(0.78%)	30.69%
Tunisia	12,544.61	0.74%	26.03%
Nigeria (NGX)	153,676.66	(0.23%)	49.31%

### 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	4.1	2.28%	2.26%
UK-10Y	4.4	(0.34%)	(2.04%)
JP-10Y	1.6	(1.08%)	(1.26%)
DE-10Y	2.6	5.73%	4.97%

### Global Currency Market

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

Currencies	Current	1 Day Change	Week-to-Date Change	% Δ YTD
GBP/USD	1.32	(1.45%)	(1.89%)	5.12%
EUR/USD	1.16	(0.35%)	(0.64%)	11.73%
JPY/USD	0.65	(0.97%)	(2.19%)	1.99%
CNY/USD	0.14	0.14%	0.14%	2.63%

#### Key:

YTD – Year to Date change