

THE NIGERIAN EQUITY MARKET SUMMARY

Friday, August 15, 2025

Insurance Sector Leads Broad-Based Sell-Off as Market Slips 0.78% for the Week

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	144,620.44	145,367.03	↓ -0.51%
Total Market Cap.	₦ Trillion	91.50	91.97	↓ -0.51%
Total Volume Traded	Million	1,367.08	2,438.26	↓ -43.93%
Total Value Traded	₦ Million	13,758.77	21,769.99	↓ -36.80%
Deals		31,717	43,164	↓ -26.52%

The Nigerian domestic market closed the week on a bearish note, as key market performance indicators (the NGX-ASI and Market Capitalization) both fell by 0.51%. The local bourse extended its downward trend for the third consecutive trading day, pressured by profit-taking activities in previously appreciated medium and high-cap stocks such as NEM, CONAHLPLC, ELLAHLAKES, MTNN, and 35 others, with the Insurance sector leading the decline among the major sectors. Specifically, the market index (All-Share Index) shed 746.59 basis points today, representing a drop of 0.51% to close at 144,620.44. Similarly, the Market Capitalization also lost ₦472.36 billion, representing a decline of 0.51%, to close at ₦91.50 trillion. On a week-on-week basis, the market posted a 0.78% decline, signaling cautious investor sentiment, which resulted in a cumulative ₦718 billion loss in investors' wealth during the week.

Furthermore, market activities were down today as the Total Volume and Total Value of trades decreased by -43.93% and -36.80% respectively. Approximately 1,367.08 million units valued at ₦13,758.77 million were transacted across 31,717 deals. In terms of volume, UNIVINSURE led the activity chat, accounting for 22.48% of the total volume of trades, followed by AIICO (8.59%), MBENEFIT (7.46%), VERITASKAP (5.13%), and SOVRENINS (4.52%), rounding out the top five. GTCO emerged as the most traded stock in value terms, with 14.46% of the total value of trades on the exchange.

MBENEFIT topped the advancers' chart for today with a price appreciation of 10.00 percent, trailed by IKEJAHOTEL with (+9.95%) growth, WEMABANK (+9.90%), DEAPCAP (+9.52%), TRIPPLEG (+8.32%), DANGSUGAR (+6.57%) and twenty-four others. Thirty-nine (39) stocks depreciated, where LASACO, INTENEGINS, and LINKASSURE were the top losers, with a price depreciation of -10.00% each, as MEYER (-9.95%), VERITASKAP (-9.92%), CONHALLPLC (-9.86%), PRESTIGE (-9.63%), and STERLINGNG (-5.06%) also dipped in price. In that regard, the market breadth closed negative, recording 30 gainers and 39 losers.

In addition, the market sectoral performance was negative today, as four out of the five major market sectors were down, led by the Insurance sector, which dropped by (-8.73%), followed by the Industrial sector, declined by (-1.84%), the Oil & Gas sector by (-0.69%), and lastly the Consumer goods sector with a loss of (-0.32%). The Banking sector appreciated by +0.56%.

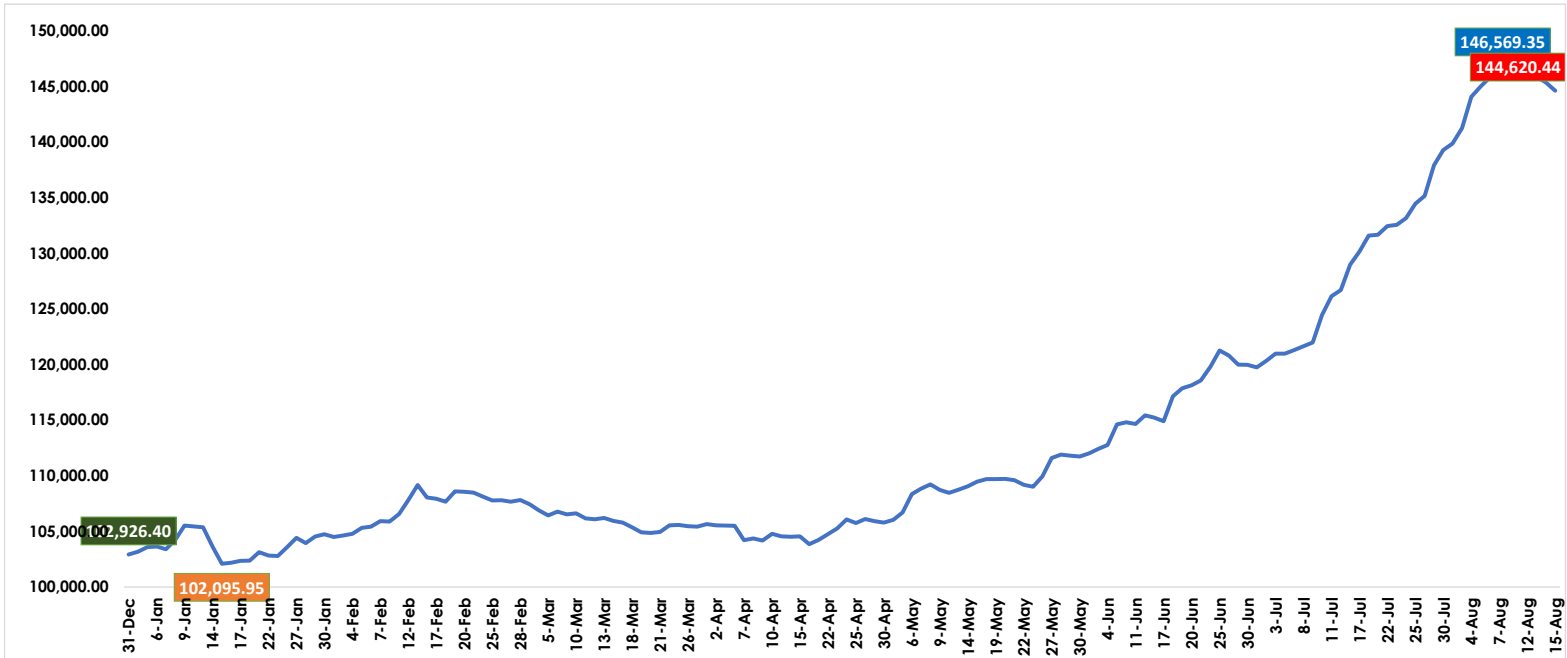
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
MBENEFIT	3.50	3.85	10.00%
IKEJAHOTEL	20.60	22.65	9.95%
WEMABANK	20.70	22.75	9.90%
DEAPCAP	1.47	1.61	9.52%
TRIPPLEG	5.17	5.60	8.32%
DANGSUGAR	52.50	55.95	6.57%
FIDSON	41.45	43.90	5.91%
FTNCOCOA	6.30	6.65	5.56%
HMCALL	4.20	4.40	4.76%
ABBEYBDS	6.23	6.50	4.33%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
LASACO	4.50	4.05	-10.00%
INTENEGINS	3.70	3.33	-10.00%
LINKASSURE	2.70	2.43	-10.00%
NEM	36.10	32.50	-9.97%
MEYER	18.60	16.75	-9.95%
REGALINS	1.51	1.36	-9.93%
WAPIC	4.03	3.63	-9.93%
VERITASKAP	2.52	2.27	-9.92%
CORNERST	7.67	6.91	-9.91%
SOVRENINS	3.24	2.92	-9.88%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
UNIVINSURE	Insurance	308,801,961	22.48%
AIICO	Insurance	117,995,006	8.59%
MBENEFIT	Financial Services	102,416,450	7.46%
VERITASKAP	Financial Services	70,423,548	5.13%
SOVRENINS	Insurance	62,153,740	4.52%
ROYALEX	Financial Services	57,849,029	4.21%
LASACO	Financial Services	52,849,199	3.85%
LINKASSURE	Insurance	50,014,392	3.64%
REGALINS	Financial Services	46,961,717	3.42%
PRESTIGE	Financial Services	39,853,599	2.90%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
GTCO	2,012,877,017.95	14.46%
ZENITHBANK	992,342,149.10	7.13%
FIRSTHOLDCO	787,084,412.80	5.65%
WAPCO	699,661,463.35	5.03%
UBA	675,877,204.55	4.86%
ELLAHLAKES	500,316,477.73	3.59%
AIICO	470,655,299.06	3.38%
SEPLAT	411,950,968.30	2.96%
FIDELITYBK	405,132,849.75	2.91%
MBENEFIT	390,746,023.07	2.81%

NGX-ASI Performance (YTD)



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Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↓	-0.51%	NGX-30	↓	-0.39%	↑	38.57%
Week-on-Week	↓	-0.78%	Banking	↑	0.56%	↑	47.81%
Month-to-Date	↑	29.42%	Consumer Goods	↓	-0.32%	↑	84.36%
Quarter-to-Date	↑	36.87%	Industrial Goods	↓	-1.84%	↑	49.80%
Year-to-Date	↑	40.51%	Insurance	↓	-8.73%	↑	88.48%
52-Weeks High		146,569.35	Oil & Gas	↓	-0.69%	↓	-11.28%
52-Weeks Low		95,718.05					

Economic Indicators	Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (₪/\$)	1534.52	1534.83	↓	-0.02% ↑	0.39%	1-Month	16.26% ↑ 0.12%
Exchange Rate - Parallel (₪/\$)	1540.00	1540	⇒	0.00% ↑	6.38%	3-Month	16.85% ↑ 0.07%
Monetary Policy Rate (MPR)	27.50%	27.50%	⇒	0.00% ⇒	0.00%	6-Month	18.63% ↑ 0.19%
Crude Oil Price (\$/Barrel)	66.49	66.94	↓	-0.67% ↓	-10.92%	9-Month	19.12% ↑ 0.12%
Foreign Reserve (\$'Bn)	40.72	40.65	↑	0.17% ↓	-0.38%	12-Month	19.57% ↑ 0.02%
Inflation Rate	22.22%	22.22%	⇒	0.00% ↓	-12.38%		

Note : -Crude oil (Brent) and Foreign Exchange price represents spot price as at the time this report was prepared
 -Foreign reserves figures have two-day lag
 -Inflation figure as at June 2025
 -NTB True Yield have a day's lag

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