

THE NIGERIAN EQUITY MARKET SUMMARY

Monday, August 25, 2025

Equity Market Opens Week Higher as Market Capitalization Appreciates by ₦284 Billion

Key Market Indicators	Units	Today	Previous Day	% Change
The All-Share Index	Basis Points	141,433.41	141,004.14	0.30%
Total Market Cap.	₦ Trillion	89.49	89.21	0.32%
Total Volume Traded	Million	591.25	1,303.26	-54.63%
Total Value Traded	₦ Million	11,658.75	47,841.15	-75.63%
Deals		33,342	25,904	28.71%

The Nigerian equity market resumed trading for the new week in the green, despite mixed movements across key performance indicators. The NGX-ASI advanced by 0.30%, adding 429.27 basis points to close at 141,004.14. Likewise, the Market Capitalization recorded a gain of ₦284.44 billion, representing a 0.32% increase to settle at ₦89.49 trillion. However, the marginal divergence between the index and the market capitalization is primarily driven to the additional listing of 270,382 units of Chapel Hill Denham Nigeria Infrastructure Debt Fund (NIDF) on the Daily Official List of the Nigerian Exchange today. Investor sentiment remained broadly positive, as reflected in the overall market breadth. The local bourse also maintained its upward momentum from last Friday, buoyed by sustained bargain hunting in recently depreciated medium and large-cap stocks across key sectors.

However, market activities were down today as the Total Volume and Total Value of trades reduced by -54.63% and -75.63% respectively. Approximately 591.25 million units valued at ₦11,658.75 million were transacted across 33,342 deals. In terms of volume, FCMB led the activity chat, accounting for 17.92% of the total volume of trades, followed by VERITASKAP (10.15%), UNIVINSURE (5.86%), AIICO (4.47%), and GTCO (4.26%), rounding out the top five. GTCO emerged as the most traded stock in value terms, with 21.43% of the total value of trades on the exchange.

JBERGER topped the advancers' chart for today with a price appreciation of 9.93 percent, trailed by CUTIX with (+9.86%) growth, REGALINS (+9.70%), VERITASKAP (+9.60%), MCNICHOLS (+9.38%), NEM (+8.83%) and thirty-four others. Seventeen (17) stocks depreciated, where UPL was the top loser, with a price depreciation of -9.92%, as CADBURY (-9.61%), AUSTINLAZ (-6.55%), TANTALIZER (-5.66%), ARADEL (-1.73%), and FIDELITYBK (-0.24%) also dipped in price. In that regard, the market breadth closed positive, recording 40 gainers and 17 losers.

In addition, the market sectoral performance was positive today, as four out of the five major market sectors were up, led by the Insurance sector, which grew by (+3.81%), followed by the Banking sector, appreciated by (+1.12%), the Consumer goods sector by (+0.29%), and lastly the Industrial sector with a marginal gain of (+0.02%). The Oil & Gas sector dropped by -0.28%.

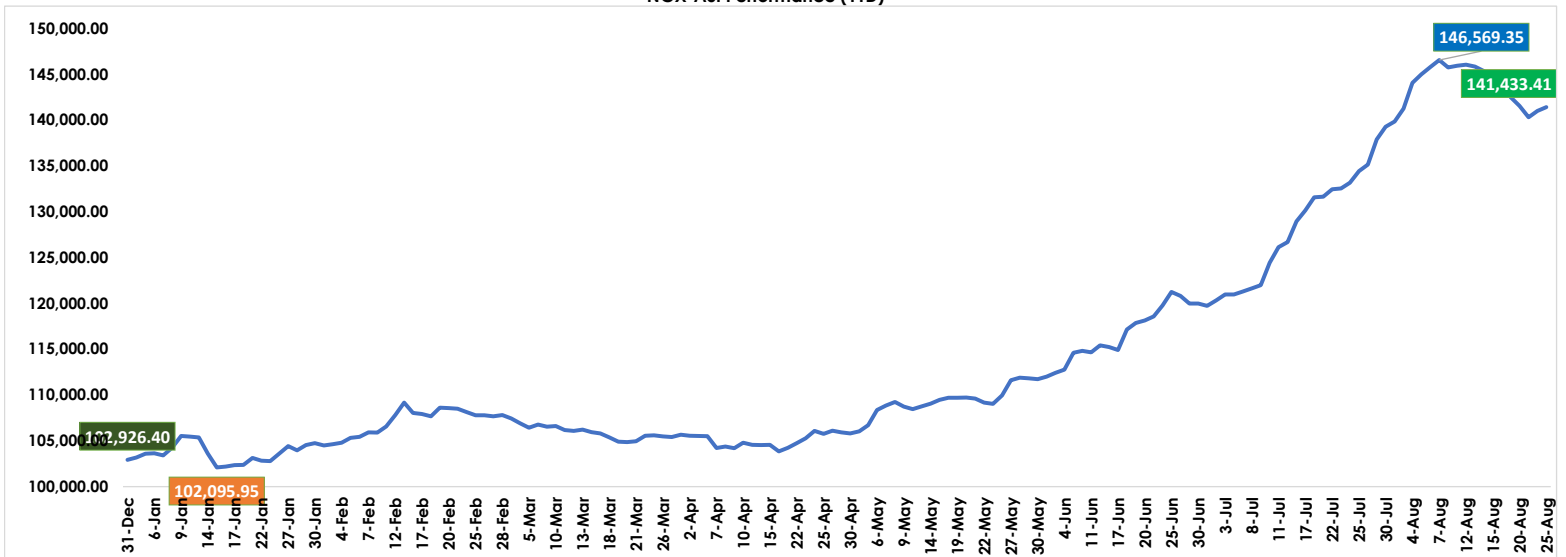
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
JBERGER	132.90	146.10	9.93%
CUTIX	3.55	3.90	9.86%
REGALINS	1.34	1.47	9.70%
VERITASKAP	1.98	2.17	9.60%
MCNICHOLS	3.20	3.50	9.38%
NEM	26.60	28.95	8.83%
UNIVINSURE	1.22	1.32	8.20%
CONHALLPLC	4.20	4.50	7.14%
AIICO	4.18	4.47	6.94%
WAPIC	3.21	3.42	6.54%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
UPL	6.15	5.54	-9.92%
CADBURY	64.00	57.85	-9.61%
ABBEYBDS	7.15	6.55	-8.39%
DAARCOMM	1.21	1.12	-7.44%
AUSTINLAZ	2.90	2.71	-6.55%
MECURE	20.75	19.50	-6.02%
TANTALIZER	2.65	2.50	-5.66%
CAVERTON	7.30	7.00	-4.11%
TIP	12.30	12.01	-2.36%
NSLTECH	1.10	1.08	-1.82%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volume
FCMB	Banking	105,126,198	17.92%
VERITASKAP	Financial Services	59,573,107	10.15%
UNIVINSURE	Insurance	34,398,889	5.86%
AIICO	Insurance	26,203,909	4.47%
GTCO	Banking	25,003,255	4.26%
SOVRENINS	Insurance	21,095,541	3.60%
MBENEFIT	Financial Services	18,050,029	3.08%
GUINEAINS	Insurance	17,220,675	2.93%
PRESTIGE	Financial Services	17,014,142	2.90%
LINKASSURE	Insurance	16,901,410	2.88%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
GTCO	2,399,945,282.45	21.43%
ARADEL	1,353,101,213.30	12.08%
FCMB	1,144,672,450.90	10.22%
ZENITHBANK	709,443,412.65	6.33%
UBA	683,605,423.40	6.10%
ACCESSCORP	426,285,914.70	3.81%
JBERGER	297,587,358.70	2.66%
MTNN	290,112,844.10	2.59%
FIDELITYBK	226,551,979.45	2.02%
FIRSTHOLDCO	224,465,222.35	2.00%

NGX-ASI Performance (YTD)



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Market Performance History			Sector Indices		A-Day Change		YTD % Change	
A-Day Change	↑	0.30%	NGX-30	↑		0.25%	↑	35.18%
Week-on-Week	↓	-2.27%	Banking	↑		1.12%	↑	44.28%
Month-to-Date	↑	26.57%	Consumer Goods	↑		0.29%	↑	86.43%
Quarter-to-Date	↑	33.86%	Industrial Goods	↑		0.02%	↑	39.78%
Year-to-Date	↑	37.41%	Insurance	↑		3.81%	↑	87.50%
52-Weeks High		146,569.35	Oil & Gas	↓		-0.28%	↓	-12.31%
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 (N/\$)	1535.04	1535.78	↓	-0.05%	↑	0.35%	1-Month	16.13% ↑ 0.08%
Exchange Rate - Parallel (N/\$)	1540.00	1540	→	0.00%	↑	6.38%	3-Month	16.73% ↓ -0.06%
Monetary Policy Rate (MPR)	27.50%	27.50%	→	0.00%	→	0.00%	6-Month	18.37% ↑ 0.04%
Crude Oil Price (\$/Barrel)	67.66	67.22	↑	0.65%	↓	-9.35%	9-Month	19.36% ↑ 0.01%
Foreign Reserve (\$'Bn)	41.08	41.05	↑	0.08%	↑	0.49%	12-Month	20.74% ↑ 0.39%
Inflation Rate	21.88%	21.88%	→	0.00%	↓	-12.72%		

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 July 2025
 -NTB True Yield have a day's lag

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