

THE NIGERIAN EQUITY MARKET SUMMARY

Thursday, August 28, 2025

Equity Market Retreats Further as NGX-ASI Slides by 0.49%

Key Market Indicators	Units	Today	Previous Day	% Change
The All-Share Index	Basis Points	140,557.24	141,248.76	↓ -0.49%
Total Market Cap.	₦ Trillion	88.93	89.37	↓ -0.49%
Total Volume Traded	Million	885.02	682.89	↑ 29.60%
Total Value Traded	₦ Million	28,300.63	22,222.42	↑ 27.35%
Deals		26,163	28,695	↓ -8.82%

The Nigerian domestic market extended its bearish momentum today, closing in a negative territory as key market performance indicators (the NGX-ASI and Market Capitalization) both declined by 0.49%. The downtrend was largely fueled by investors' continued digestion of recent gains, with sell pressures concentrated in medium and high-cap stocks such as ELLAHLAKES, DANGSUGAR, GTCO, WAPCO, and 34 others. This marks the second consecutive session of losses, resulting in a cumulative decline of approximately ₦754 billion in investors' wealth. Specifically, the market index (All-Share Index) shed 691.52 basis points today, representing a drop of 0.49% to close at 140,557.24. Similarly, the Market Capitalization also lost ₦437.54 billion, representing a decline of 0.49%, to close at ₦88.93 trillion.

However, market activities were up today as the Total Volume and Total Value of trades increased by +29.60% and +27.35% respectively. Approximately 885.02 million units valued at ₦28,300.63 million were transacted across 26,163 deals. In terms of volume, CHAMPION led the activity chat, accounting for 22.75% of the total volume of trades, followed by ACCESSCORP (11.56%), GTCO (10.91%), STERLINGNG (10.28%), and FIRSTHOLDCO (5.23%), rounding out the top five. GTCO emerged as the most traded stock in value terms, with 31.48% of the total value of trades on the exchange.

SCOA topped the advancers' chart for today with a price appreciation of 10.00 percent, trailed by RTBRISCOE with (+9.80%) growth, NEM (+7.96%), NGXGROUP (+7.94%), MCNICHOLS (+7.04%), AUSTINLAZ (+6.62%) and thirteen others. Thirty-eight (38) stocks depreciated, where INTENEGINS was the top loser, with a price depreciation of -9.62%, as ELLAHLAKES (-8.49%), DANGSUGAR (-5.54%), HONYFLOUR (-4.44%), JAPAUFGOLD (-3.94%), and GTCO (-3.11%) also dipped in price. In that regard, the market breadth closed negative, recording 19 gainers and 38 losers.

In addition, the market sectoral performance was negative today, as four out of the five major market sectors were down, led by the Banking sector, which declined by (-1.41%), followed by the Consumer goods which depreciated by (-0.92%), the Industrial sector by (-0.45%), and lastly the Oil & Gas sector with a loss of (-0.02%). The Insurance sector increased by +0.44%.

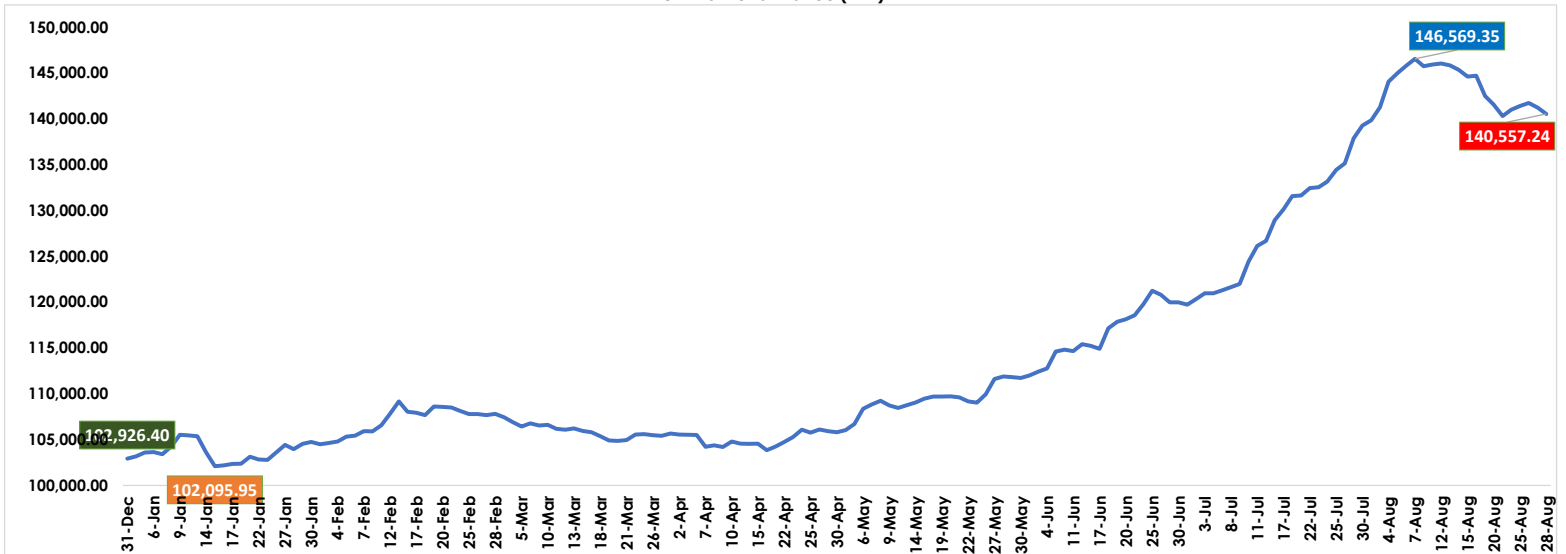
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
SCOA	5.50	6.05	10.00%
RTBRISCOE	3.06	3.36	9.80%
NEM	28.90	31.20	7.96%
NGXGROUP	53.55	57.80	7.94%
MCNICHOLS	3.55	3.80	7.04%
AUSTINLAZ	2.72	2.90	6.62%
CUTIX	3.50	3.69	5.43%
UNIVINSURE	1.23	1.28	4.07%
DEAPCAP	1.74	1.81	4.02%
CAVERTON	6.40	6.55	2.34%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
INTENEGINS	3.64	3.29	-9.62%
OMATEK	1.45	1.32	-8.97%
ELLAHLAKES	14.95	13.68	-8.49%
ROYALEX	2.15	2.00	-6.98%
SUNUASSUR	5.92	5.54	-6.42%
DANGSUGAR	61.40	58.00	-5.54%
NSLTECH	0.95	0.90	-5.26%
FCMB	11.00	10.50	-4.55%
HONYFLOUR	22.50	21.50	-4.44%
LEGENDINT	5.65	5.40	-4.42%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volume
CHAMPION	Consumer goods	201,053,143	22.75%
ACCESSCORP	Banking	102,182,356	11.56%
GTCO	Banking	96,449,936	10.91%
STERLINGNG	Banking	90,824,256	10.28%
FIRSTHOLDCO	Banking	46,257,501	5.23%
FCMB	Banking	42,584,400	4.82%
FIDELITYBK	Banking	33,500,051	3.79%
JAPAUFGOLD	Oil & Gas	18,448,352	2.09%
NSLTECH	ICT	15,172,005	1.72%
SOVRENINS	Insurance	11,771,706	1.33%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
GTCO	8,886,922,264.75	31.48%
ARADEL	3,551,834,847.50	12.58%
CHAMPION	3,474,064,662.90	12.31%
ACCESSCORP	2,761,635,959.10	9.78%
FIRSTHOLDCO	1,504,888,691.35	5.33%
STERLINGNG	726,592,471.65	2.57%
FIDELITYBK	711,411,368.85	2.52%
UBA	462,793,484.00	1.64%
ZENITHBANK	461,776,367.45	1.64%
GEREGU	452,669,357.80	1.60%

NGX-ASI Performance (YTD)



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Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↓	-0.49%	NGX-30	↓	-0.50%	↑	34.49%
Week-on-Week	↑	0.16%	Banking	↓	-1.41%	↑	42.20%
Month-to-Date	↑	25.79%	Consumer Goods	↓	-0.92%	↑	83.99%
Quarter-to-Date	↑	33.03%	Industrial Goods	↓	-0.45%	↑	39.27%
Year-to-Date	↑	36.56%	Insurance	↑	0.44%	↑	81.56%
52-Weeks High	146,569.35		Oil & Gas	↓	-0.02%	↓	-11.74%
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 (₹/\$)	1537.07	1536.42	↑	0.04%	0.22%	1-Month	16.21% ↑ 0.05%
Exchange Rate - Parallel (₹/\$)	1538.00	1535	↑	0.20%	6.50%	3-Month	16.89% ↑ 0.19%
Monetary Policy Rate (MPR)	27.50%	27.50%	→	0.00%	0.00%	6-Month	18.66% ↑ 0.25%
Crude Oil Price (\$/Barrel)	67.36	67.44	↓	-0.12%	-9.75%	9-Month	19.53% ↑ 0.26%
Foreign Reserve (\$Bn)	41.22	41.19	↑	0.07%	0.84%	12-Month	20.52% ↑ 0.09%
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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