

## THE NIGERIAN EQUITY MARKET SUMMARY

Friday, August 29, 2025

### Local Bourse Ends Week Bearish Amid Sustained Caution; NGX-ASI Drops by -0.51% w/w

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	140,284.90	140,557.24 ↓	-0.19%
Total Market Cap.	₦ Trillion	88.77	88.93 ↓	-0.19%
Total Volume Traded	Million	435.14	885.02 ↓	-50.83%
Total Value Traded	₦ Million	10,391.10	28,300.63 ↓	-63.28%
Deals		25,609	26,163 ↓	-2.12%

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 0.19%. The local bourse extended its downward trend for the third consecutive trading day, weighed down by sustained profit-taking in previously appreciated medium and high-cap stocks such as MANSARD, OANDO, ACCESSCORP, NB and 27 others. The Insurance sector led the decline among major sectors, reflecting broad-based weakness across the market. Specifically, the market index (All-Share Index) shed 272.34 basis points today, representing a drop of -0.19% to close at 140,284.90. Similarly, the Market Capitalization also lost ₦165.63 billion, representing a decline of -0.19%, to close at ₦88.77 trillion. On a week-on-week basis, the market posted a 0.51% loss, signaling cautious investor sentiment, which resulted in a cumulative ₦440 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 -50.83% and -63.28% respectively. Approximately 435.14 million units valued at ₦10,391.10 million were transacted across 25,609 deals. In terms of volume, VFDGROUP led the activity chat, accounting for 11.38% of the total volume of trades, followed by NSLTECH (7.66%), ACCESSCORP (6.20%), GTCO (4.92%), and FIRSTHOLDCO (4.60%), rounding out the top five. GTCO emerged as the most traded stock in value terms, with 19.01% of the total value of trades on the exchange.

LEARNAFRCA topped the advancers' chart for today with a price appreciation of 9.86 percent, trailed by UNIONDICON with (+8.04%) growth, PRESTIGE (+6.75%), ACADEMY (+6.11%), OMATEK (+6.06%), BERGER (+5.73%) and twelve others. Thirty-one (31) stocks depreciated, where JOHNHOLT was the top loser, with a price depreciation of -10.00%, as UNIVINSURE (-6.25%), OANDO (-4.92%), ZENITHBANK (-4.35%), TRANSCORP (-1.98%), and LEGENDINT (-0.93%) also dipped in price. In that regard, the market breadth closed negative, recording 18 gainers and 31 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 declined by (-1.54%), followed by the Banking which depreciated by (-0.88%), the Oil & Gas sector by (-0.51%), and lastly the Industrial sector with a loss of (-0.01%). The Consumer goods sector increased by +0.14%.

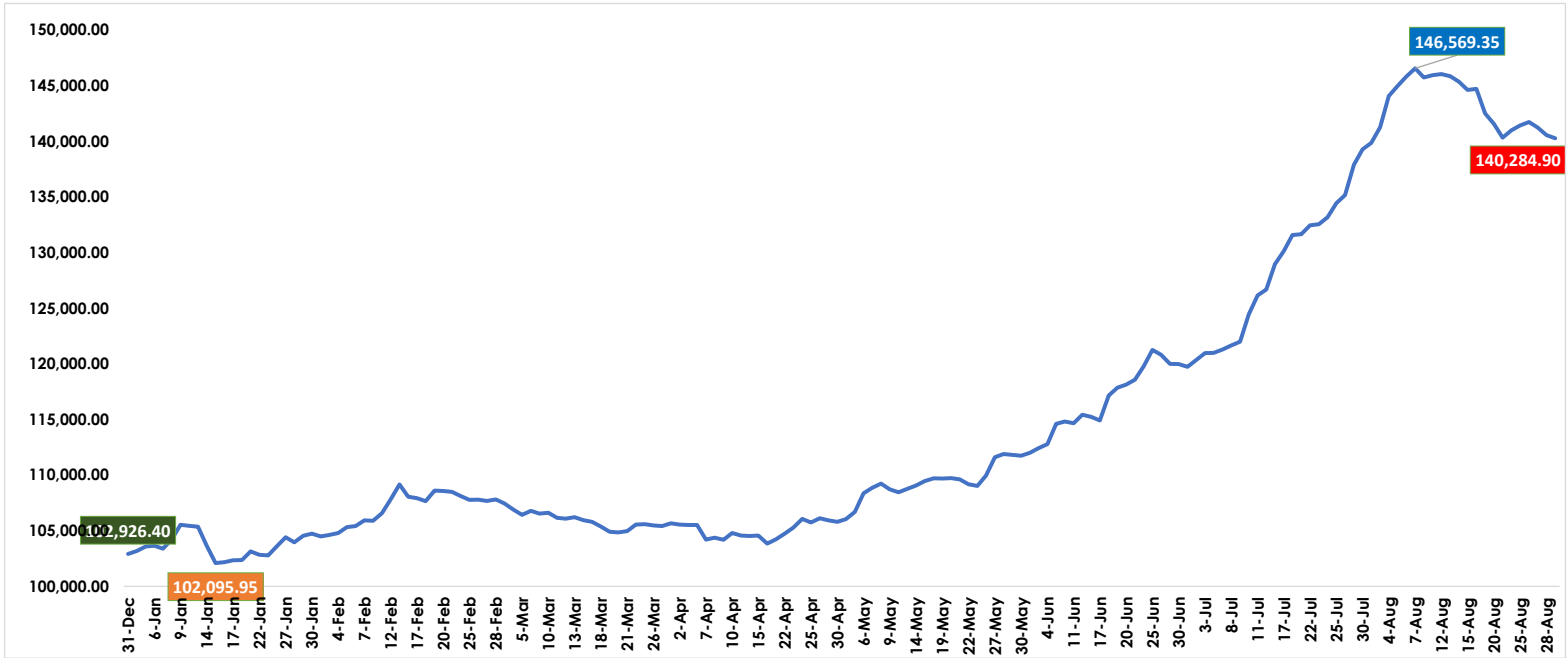
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
LEARNAFRCA	7.10	7.80	9.86%
UNIONDICON	11.20	12.10	8.04%
PRESTIGE	1.63	1.74	6.75%
ACADEMY	9.00	9.55	6.11%
OMATEK	1.32	1.40	6.06%
BERGER	34.90	36.90	5.73%
RTBRISCOE	3.36	3.54	5.36%
CAVERTON	6.55	6.90	5.34%
HONYFLOUR	21.50	22.55	4.88%
JAPAULGOLD	2.68	2.80	4.48%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
JOHNHOLT	7.00	6.30	-10.00%
LASACO	3.32	3.00	-9.64%
GUINEAINS	1.54	1.42	-7.79%
UNIVINSURE	1.28	1.20	-6.25%
NSLTECH	0.90	0.85	-5.56%
MANSARD	16.50	15.60	-5.45%
CUTIX	3.69	3.50	-5.15%
OANDO	53.85	51.20	-4.92%
CWG	16.45	15.70	-4.56%
ZENITHBANK	69.00	66.00	-4.35%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
VFDGROUP	Investment	49,290,627	11.38%
NSLTECH	ICT	33,173,640	7.66%
ACCESSCORP	Banking	26,854,261	6.20%
GTCO	Banking	21,331,899	4.92%
FIRSTHOLDCO	Banking	19,932,245	4.60%
UNIVINSURE	Insurance	19,532,296	4.51%
FCMB	Banking	18,322,467	4.23%
ZENITHBANK	Banking	17,349,095	4.01%
SOVRENINS	Insurance	16,332,180	3.77%
JAIZBANK	Banking	13,809,152	3.19%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
GTCO	1,965,170,691.35	19.01%
ZENITHBANK	1,174,818,285.75	11.36%
WAPCO	932,843,804.75	9.02%
ACCESSCORP	716,975,247.10	6.94%
FIRSTHOLDCO	646,667,101.60	6.26%
VFDGROUP	542,209,340.50	5.24%
MTNN	412,869,520.30	3.99%
OANDO	384,339,294.25	3.72%
UBA	382,032,510.65	3.70%
FCMB	192,949,196.05	1.87%

NGX-ASI Performance (YTD)



Friday, August 29, 2025

Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↓	-0.19%	NGX-30	↓		-0.21% ↑	34.21%
Week-on-Week	↓	-0.51%	Banking	↓		-0.88% ↑	40.95%
Month-to-Date	↑	25.54%	Consumer Goods	↑		0.14% ↑	84.24%
Quarter-to-Date	↑	32.77%	Industrial Goods	↓		-0.01% ↑	39.26%
Year-to-Date	↑	36.30%	Insurance	↓		-1.54% ↑	78.77%
52-Weeks High		146,569.35	Oil & Gas	↓		-0.51% ↓	-12.19%
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/\$)	1535.47	1537.07 ↓	-0.10% ↑	0.33%	1-Month	16.21% ↑	0.00%
Exchange Rate - Parallel (N/\$)	1540.00	1538 ↑	0.13% ↑	6.38%	3-Month	17.01% ↑	0.05%
Monetary Policy Rate (MPR)	27.50%	27.50% →	0.00% →	0.00%	6-Month	18.51% ↑	0.06%
Crude Oil Price (\$/Barrel)	67.71	67.98 ↓	-0.40% ↓	-9.28%	9-Month	19.63% ↑	0.02%
Foreign Reserve (\$'Bn)	41.24	41.22 ↑	0.06% ↑	0.90%	12-Month	20.70% ↑	0.06%
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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