

## THE NIGERIAN EQUITY MARKET SUMMARY

Thursday, September 4, 2025

### Positive Sentiment Returns Ahead of Eid-ul Mawlid Break; NGX-ASI Down by 1.12% w/w

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	138,980.83	138,157.16	↑ 0.60%
Total Market Cap.	₦ Trillion	87.94	87.42	↑ 0.60%
Total Volume Traded	Million	1,805.33	482.76	↑ 273.96%
Total Value Traded	₦ Million	15,696.39	19,672.82	↓ -20.21%
Deals		24,397	28,193	↓ -13.46%

The Nigerian equity market closed the week on a positive note ahead of the Eid -ul Mawlid holiday, as key market performance indicators (the NGX-ASI and Market Capitalization) both advanced by 0.60%. This rebound halted six successive sessions of decline, supported by renewed buying interest in recently moderated medium and large cap stocks, such as ELLAHLAKES, HONYFLOUR, AICO, TRANSCORP, among others across major sectors. Specifically, the market index (All-Share Index) added 823.67 basis points in today's trading session, reflecting a 0.60% increase to close at 138,980.83. Likewise, the Market Capitalization also gained ₦521.15 billion, representing a growth of 0.60%, settling at ₦87.94 trillion. However, despite the positive close for the day, the overall market posted a bearish performance on a week-on-week basis. The NGX-ASI shed -1.12%, while investors wealth also shrank by approximately ₦832 billion.

However, market activities were mixed today as the Total Volume of trades surged by +273.96%, while the Total Value dropped by -20.21%. Approximately 1,805.33 million units valued at ₦15,696.39 million were transacted across 24,397 deals. In terms of volume, SOVRENINS led the activity chat, accounting for 77.91% of the total volume of trades, followed by NB (2.27%), FIDELITYBK (1.68%), ZENITHBANK (1.45%), and UNIVINSURE (1.33%), rounding out the top five. SOVRENINS also emerged as the most traded stock in value terms, with 26.40% of the total value of trades on the exchange.

ELLAHALAKES and VERITASKAP topped the advancers' chart for today with a price appreciation of 10.00 percent each, trailed by HONYFLOUR with (+9.95%) growth, ROYALEX (+9.94%), MANSARD (+9.94%), PRESTIGE (+9.88%), INTBREW (+9.82%) and thirty-four others. Twelve (12) stocks depreciated, where AUSTINLAZ was the top loser, with a price depreciation of -9.75%, as NEIMETH (-8.33%), CHAMPION (-4.15%), UNILEVER (-4.11%), TANTALIZER (-3.36%), and STERLINGNG (-0.66%) also dipped in price. In that regard, the market breadth closed largely positive, recording 41 gainers and 12 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 appreciated by (+6.73%), followed by the Consumer goods with an increase of (+1.54%), the Banking sector by (+0.98%), and lastly the Oil & Gas sector with a marginal gain of (+0.03%). The Industrial sector closed flat.

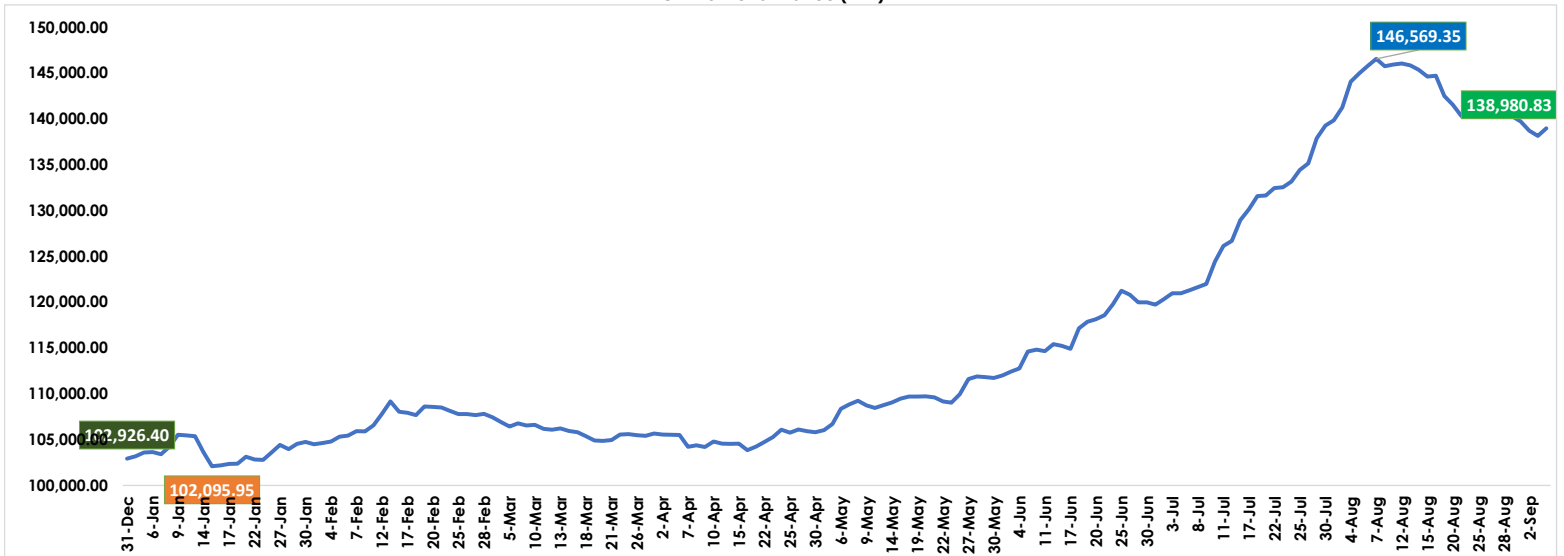
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
ELLAHLAKES	11.80	12.98	10.00%
VERITASKAP	1.80	1.98	10.00%
HONYFLOUR	21.10	23.20	9.95%
ROYALEX	1.71	1.88	9.94%
MANSARD	14.39	15.82	9.94%
PRESTIGE	1.62	1.78	9.88%
INTBREW	11.20	12.30	9.82%
SUNUASSUR	5.01	5.50	9.78%
AICO	3.18	3.49	9.75%
CORNERST	6.55	7.18	9.62%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
AUSTINLAZ	3.18	2.87	-9.75%
NEIMETH	6.60	6.05	-8.33%
DAARCOMM	0.90	0.86	-4.44%
CHAMPION	15.65	15.00	-4.15%
UNILEVER	73.00	70.00	-4.11%
RTBRISCOE	3.42	3.30	-3.51%
TANTALIZER	2.38	2.30	-3.36%
UCAP	18.70	18.10	-3.21%
AFRIPRUD	15.40	14.95	-2.92%
STERLINGNG	7.55	7.50	-0.66%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volume
SOVRENINS	Insurance	1,416,633,778	77.91%
NB	Consumer goods	41,203,061	2.27%
FIDELITYBK	Banking	30,556,060	1.68%
ZENITHBANK	Banking	26,351,035	1.45%
UNIVINSURE	Insurance	24,154,245	1.33%
ACCESSCORP	Banking	18,435,888	1.01%
CUTIX	Industrial	14,854,619	0.82%
STERLINGNG	Banking	12,660,880	0.70%
UBA	Banking	12,399,381	0.68%
ELLAHLAKES	Agriculture	11,856,622	0.65%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
SOVRENINS	4,214,278,367.87	26.40%
NB	2,821,560,159.40	17.67%
ZENITHBANK	1,704,144,643.55	10.67%
MTNN	864,094,313.00	5.41%
FIDELITYBK	642,120,505.40	4.02%
UBA	576,229,961.60	3.61%
GTCO	525,442,107.35	3.29%
ACCESSCORP	478,737,930.00	3.00%
GEREGU	451,837,163.80	2.83%
ARADEL	370,305,140.40	2.32%

# NGX-ASI Performance (YTD)



Thursday, September 4, 2025

Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↑	0.60%	NGX-30	↑		0.62%	33.18%
Week-on-Week	↓	-1.61%	Banking	↑		0.98%	38.81%
Month-to-Date	↓	-0.94%	Consumer Goods	↑		1.54%	82.07%
Quarter-to-Date	↑	15.84%	Industrial Goods	↑		0.00%	36.36%
Year-to-Date	↑	35.03%	Insurance	↑		6.73%	78.13%
52-Weeks High		146,569.35	Oil & Gas	↑		0.03%	-12.87%
52-Weeks Low		95,973.45					

Economic Indicators	Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (N/\$)	1526.06	1526.09	↓	0.00%	0.94%	1-Month	16.68% ↑ 0.14%
Exchange Rate - Parallel (N/\$)	1525.00	1530	↓	-0.33%	7.29%	3-Month	17.72% ↑ 0.16%
Monetary Policy Rate (MPR)	27.50%	27.50%	→	0.00%	0.00%	6-Month	18.44% ↓ -0.07%
Crude Oil Price (\$/Barrel)	66.81	67.6	↓	-1.17%	-10.49%	9-Month	19.28% ↓ -0.02%
Foreign Reserve (\$Bn)	41.42	41.31	↑	0.28%	1.33%	12-Month	20.18% ↑ 0.11%
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

## Disclaimer

This report by Atliss Portfolio Ltd is for information purposes only. While opinions and estimates therein have been carefully prepared, the company and its employees do not guaranty the complete accuracy of the information contained herewith as information was also gathered from various sources believed to be reliable and accurate at the time of this report. We do not take responsibility therefore for any loss arising from the use of the information contained herein.

## Contact Information

[aadabale@atlassportfolios.com](mailto:aadabale@atlassportfolios.com)

[research@atlassportfolios.com](mailto:research@atlassportfolios.com)