

THE NIGERIAN EQUITY MARKET SUMMARY

Friday, September 12, 2025

Local Bourse Records 1.13% Weekly Gain Despite Friday's Pullback

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	140,545.69	140,665.84	↓ -0.09%
Total Market Cap.	₦ Trillion	88.92	89.00	↓ -0.09%
Total Volume Traded	Million	434.73	378.18	↑ 14.95%
Total Value Traded	₦ Million	16,166.63	12,408.03	↑ 30.29%
Deals		23,729	22,935	↑ 3.46%

The Nigerian equity market ended the week on a negative note, bringing an end to its bullish streak as key market performance indicators (the NGX-ASI and Market Capitalization) both dropped by 0.09%. Despite recording positive market breadth and activity levels, the bearish close was primarily driven by profit-taking in recently appreciated medium and large cap stocks, including LASACO, PZ, NGXGROUP, DANGCEM and others across major sectors. As a result, the market index (All-Share Index) fell by 120.15 basis points today, representing a drop of -0.09% to close at 140,545.69. Similarly, the Market Capitalization also lost ₦81.44 billion, representing a decline of -0.09%, to close at ₦88.92 trillion. However, on a week-on-week basis, the market maintained a strong overall performance, advancing by 1.13%. Investors wealth grew by ₦985.24 trillion during the week, reflecting sustained interest in equities earlier in the week before Friday's profit-taking trimmed gains.

Market activities were up today as the Total Volume and Total Value of trade increased by +50.74% and +69.47% respectively. Approximately 434.73 million units valued at ₦16,166.13 million were transacted across 23,729 deals. In terms of volume, NSLTECH led the activity chart, accounting for 16.46% of the total volume of trades, followed by ACCESSCORP (9.44%), STERLINGNG (8.56%), REGALINS (4.64%), and CHAMS (4.47%), rounding out the top five. ARADEL emerged as the most traded stock in terms of value, with 54.44% of the total value of trade on the exchange.

REGALINS and ETRANSACT topped the advancers' chart for today with a price appreciation of 9.93 percent each, trailed by CHELLARAM (+9.92%) growth, IMG (+9.91%), JOHNHOLT (+9.56%), TANTALIZER (+7.92%), CHAMS (+6.91%) and twenty-four others. Twenty-one (21) stocks depreciated, where MBENEFIT was the top loser, with a price depreciation of -7.80%, as DAARCOMM (-4.50%), NGXGROUP (-3.30%), DANGCEM (-3.18%), AICO (-2.57%), and INTBREW (-1.21%) also dipped in price. In that regard, the market breadth closed positively, recording 31 gainers and 21 losers.

In addition, the market sectoral performance was negative today, as three out of the five major market sectors were down, led by the Industrial sector, which dropped by (-1.39%), followed by the Insurance sector with a decrease of (-0.62%), and lastly the Consumer goods sector by (-0.13%). The Oil & Gas and Banking sectors grew by +1.08% and +0.97% accordingly.

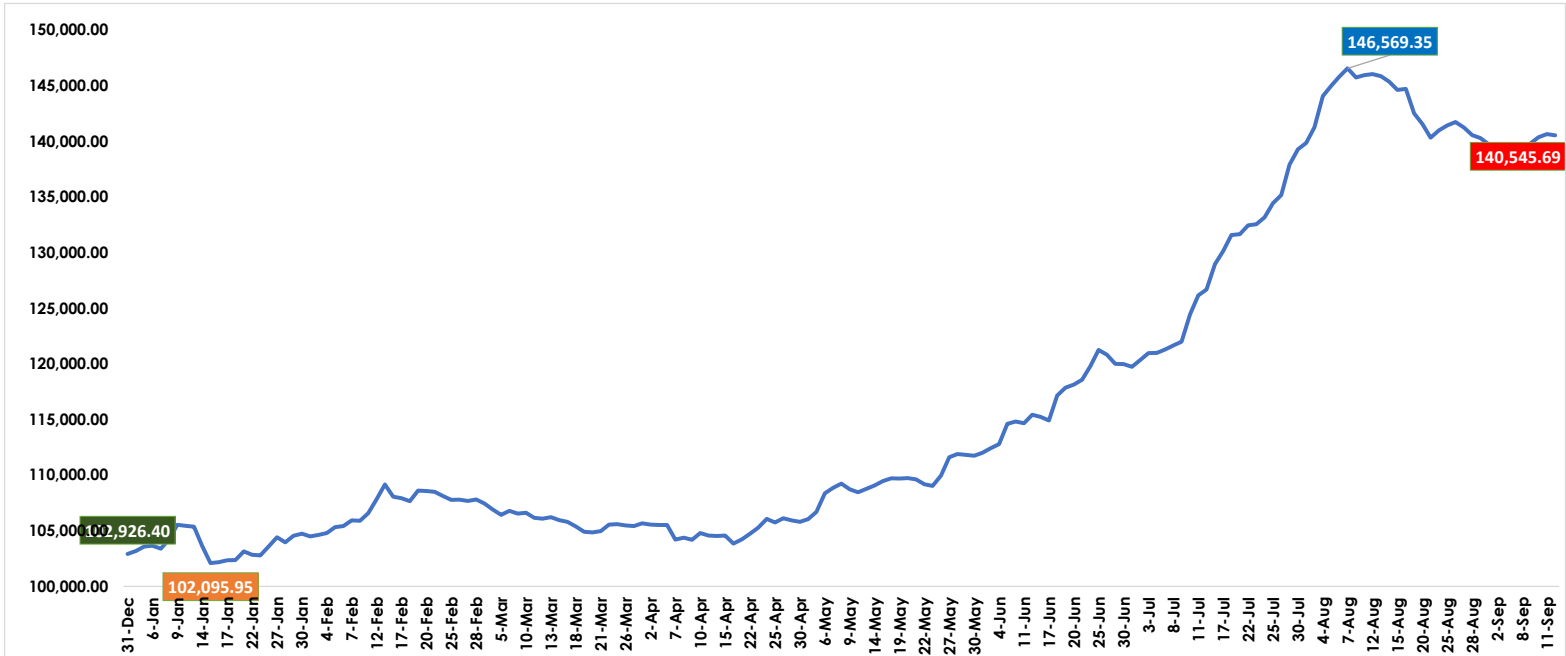
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
REGALINS	1.51	1.66	9.93%
ETRANZACT	13.60	14.95	9.93%
CHELLARAM	12.10	13.30	9.92%
IMG	33.30	36.60	9.91%
JOHNHOLT	6.80	7.45	9.56%
TANTALIZER	2.40	2.59	7.92%
CHAMS	3.04	3.25	6.91%
STERLINGNG	7.50	7.90	5.33%
ABBEYBDS	6.50	6.80	4.62%
CWG	16.20	16.90	4.32%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
MBENEFIT	4.23	3.90	-7.80%
LASACO	3.18	2.99	-5.97%
DAARCOMM	1.11	1.06	-4.50%
PZ	36.05	34.85	-3.33%
NGXGROUP	62.20	60.15	-3.30%
CAVERTON	6.72	6.50	-3.27%
DANGCEM	528.00	511.20	-3.18%
UCAP	19.50	18.90	-3.08%
OMATEK	1.36	1.32	-2.94%
LINKASSURE	2.14	2.08	-2.80%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volume
NSLTECH	ICT	71,438,152	16.46%
ACCESSCORP	Banking	40,955,473	9.44%
STERLINGNG	Banking	37,146,718	8.56%
REGALINS	Insurance	20,149,473	4.64%
CHAMS	ICT	19,378,610	4.47%
FIDELITYBK	Banking	18,977,514	4.37%
LASACO	Insurance	18,791,923	4.33%
ARADEL	Oil & Gas	16,138,245	3.72%
ZENITHBANK	Banking	15,958,045	3.68%
JAIZBANK	Banking	11,277,535	2.60%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
ARADEL	8,786,333,936.80	54.44%
ACCESSCORP	1,095,879,494.30	6.79%
ZENITHBANK	1,077,609,900.40	6.68%
DANGCEM	535,633,092.80	3.32%
FIDELITYBK	398,923,047.10	2.47%
UBA	396,761,896.70	2.46%
GTCO	281,982,329.65	1.75%
STERLINGNG	279,021,094.60	1.73%
NB	199,546,249.55	1.24%
WAPCO	185,794,203.70	1.15%

NGX-ASI Performance (YTD)



Friday, September 12, 2025

Market Performance History			Sector Indices		A-Day Change		YTD % Change	
A-Day Change	↓	-0.09%	NGX-30	↓	-0.12%	↑	34.33%	
Week-on-Week	↑	1.73%	Banking	↑	0.97%	↑	41.13%	
Month-to-Date	↑	0.18%	Consumer Goods	↓	-0.13%	↑	83.85%	
Quarter-to-Date	↑	17.14%	Industrial Goods	↓	-1.39%	↑	37.91%	
Year-to-Date	↑	36.55%	Insurance	↓	-0.62%	↑	82.49%	
52-Weeks High		146,569.35	Oil & Gas	↑	1.08%	↓	-10.79%	
52-Weeks Low		96,206.46						

Economic Indicators	Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (N/\$)	1502.13	1500.92	↑	0.08%	2.49%	1-Month	16.62% ↑ 0.04%
Exchange Rate - Parallel (N/\$)	1505.00	1513	↓	-0.53%	8.51%	3-Month	17.84% ↑ 0.25%
Monetary Policy Rate (MPR)	27.50%	27.50%	→	0.00%	0.00%	6-Month	18.83% ↑ 0.12%
Crude Oil Price (\$/Barrel)	66.86	66.37	↑	0.74%	-10.42%	9-Month	19.75% ↑ 0.24%
Foreign Reserve (\$'Bn)	41.62	41.60	↑	0.07%	1.83%	12-Month	20.65% ↑ 0.08%
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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