

THE NIGERIAN EQUITY MARKET SUMMARY

Monday, October 13, 2025

Local Bourse Hits Fresh All-Time High as Positive Momentum Continues

Key Market Indicators	Units	Today	Previous Day	% Change
The All-Share Index	Basis Points	147,717.21	147,042.99	↑ 0.46%
Total Market Cap.	₦ Trillion	93.76	93.33	↑ 0.46%
Total Volume Traded	Million	615.91	385.58	↑ 59.74%
Total Value Traded	₦ Million	13,278.28	11,025.81	↑ 20.43%
Deals		31,318	21,813	↑ 43.57%

The Nigerian equity market commenced the week on a positive note, as key performance indicators "the NGX-ASI and the Market Capitalization" both appreciated by 0.46%. The uptrend was fueled by sustained buying interest in large and moderately priced stocks, such as TRANSPOWER, STANBIC, DANGCEM, ETERNA, and 20 others across major market sectors. Investors' sentiment remained upbeat, as they patiently await the release of third-quarter corporate earnings of listed companies. Continued decline in yields across the fixed-income market further enhanced the market growth. Consequently, the market index (All-Share Index) increased by 674.22 basis points in today's trading session, reflecting a 0.46% growth to close at a fresh all-time high of 147,717.21. Likewise, the Market Capitalization also gained ₦429.78 billion, representing a growth of 0.46%, settling at ₦93.76 trillion.

Furthermore, market activities were up today as the Total Volume and Total Value of trade increased by +59.74% and +20.43% respectively. Approximately 615.91 million units valued at ₦13,278.28 million were transacted across 31,318 deals. In terms of volume, CONHALLPLC led the activity chart, accounting for 33.90% of the total volume of trades, followed by FIDELITYBK (7.65%), CHAMS (7.08%), UNIVINSURE (4.82%), and SOVRENINS (3.75%), rounding out the top five. MTNN emerged as the most traded stock in terms of value, with 19.49% of the total value of trade on the exchange.

SOVRENINS topped the advancers' chart for today with a price appreciation of 9.97 percent, trailed by REGALINS (+9.68%) growth, TRANSPOWER (+8.92%), CONHALLPLC (+7.14%), HMCALL (+6.80%), CUSTODIAN (+5.78%) and eighteen others. Twenty-five (25) stocks were depreciated, where TRIPPLEG was the top loser, with a price depreciation of -9.92%, as WEMABANK (-4.51%), NGXGROUP (-3.33%), CHAMS (-2.79%), VFDGROUP (-2.26%), and HONYFLOUR (-1.09%) also dipped in price. In that regard, the market breadth closed slightly negatively, recording 24 gainers and 25 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 (+2.11%), followed by the Industrial sector with an increase of (+0.66%), the Consumer goods sector by (+0.23%), and lastly the Banking sector with a gain of (+0.16%). The Oil & Gas sector dropped by -0.03%.

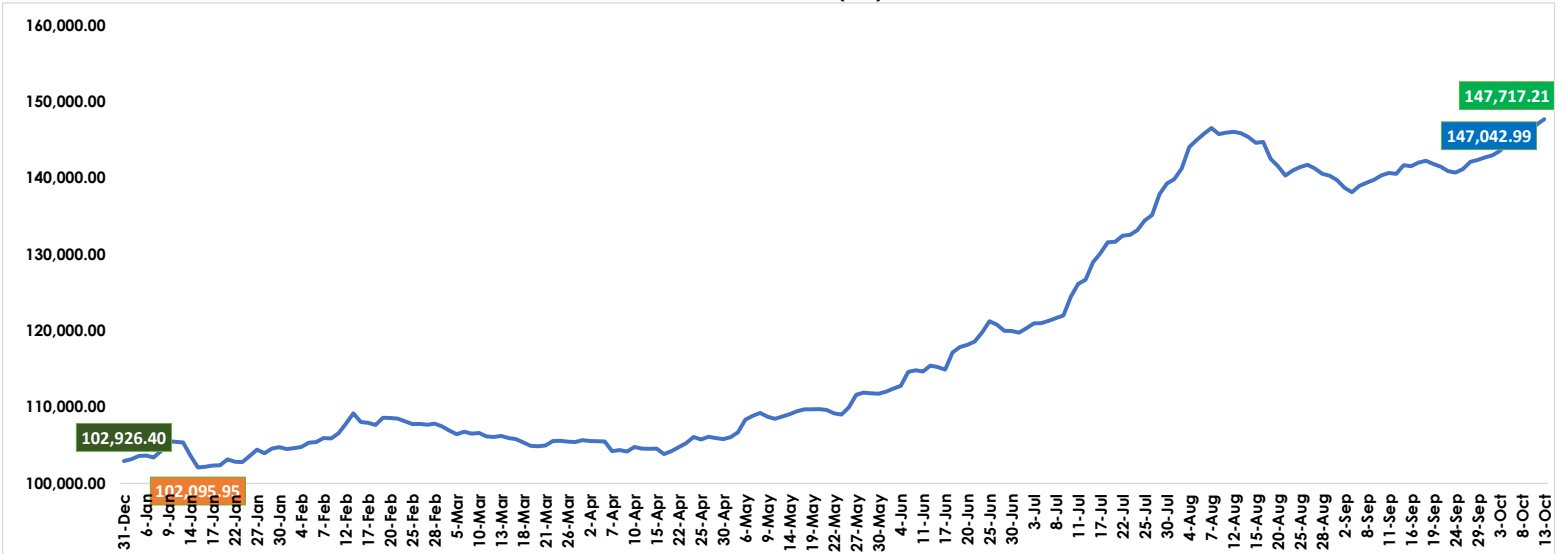
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
SOVRENINS	3.21	3.53	9.97%
REGALINS	1.24	1.36	9.68%
TRANSPOWER	314.00	342.00	8.92%
CONHALLPLC	4.20	4.50	7.14%
HMCALL	4.12	4.40	6.80%
CUSTODIAN	40.65	43.00	5.78%
STANBIC	109.00	115.00	5.50%
MANSARD	16.10	16.95	5.28%
GUINEAINS	1.43	1.49	4.20%
LINKASSURE	2.02	2.10	3.96%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
TRIPPLEG	6.05	5.45	-9.92%
WEMABANK	19.95	19.05	-4.51%
LIVINGTRUST	5.20	5.00	-3.85%
NGXGROUP	60.00	58.00	-3.33%
CUTIX	3.90	3.78	-3.08%
PRESTIGE	1.69	1.64	-2.96%
CHAMS	4.30	4.18	-2.79%
DAARCOMM	1.08	1.05	-2.78%
VFDGROUP	11.05	10.80	-2.26%
LEGENDINT	5.62	5.50	-2.14%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volume
CONHALLPLC	Investment	210,461,558	33.90%
FIDELITYBK	Banking	47,465,203	7.65%
CHAMS	ICT	43,961,090	7.08%
UNIVINSURE	Insurance	29,903,421	4.82%
SOVRENINS	Insurance	23,259,918	3.75%
ZENITHBANK	Banking	21,102,619	3.40%
ACCESSCORP	Banking	13,709,786	2.21%
FCMB	Banking	12,948,050	2.09%
LASACO	Insurance	12,741,572	2.05%
LINKASSURE	Insurance	11,187,242	1.80%

Top 10 Traders By Value	Sector	Value (₦)	% of Mkt Value
MTNN	Telecom	2,618,050,952.30	19.49%
ZENITHBANK	Banking	1,439,621,754.90	10.72%
GTCO	Banking	1,039,861,264.05	7.74%
FIDELITYBK	Banking	951,815,017.60	7.09%
CONHALLPLC	Investment	909,648,075.07	6.77%
DANGCEM	Industrial	790,397,804.90	5.88%
TRANSPOWER	Utilities	586,682,590.20	4.37%
ARADEL	Oil & Gas	564,815,499.20	4.20%
WAPCO	Industrial	518,745,364.40	3.86%
ACCESSCORP	Banking	358,286,596.45	2.67%

NGX-ASI Performance (YTD)



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Market Performance History			Sector Indices		A-Day Change		YTD % Change	
A-Day Change	↑	0.46%	NGX-30	↑	0.50%	↑	41.39%	
Week-on-Week	↑	2.88%	Banking	↑	0.16%	↑	40.42%	
Month-to-Date	↑	3.51%	Consumer Goods	↑	0.23%	↑	98.50%	
Quarter-to-Date	↑	3.51%	Industrial Goods	↑	0.66%	↑	49.14%	
Year-to-Date	↑	43.52%	Insurance	↑	2.11%	↑	78.83%	
52-Weeks High		147,717.21	Oil & Gas	↓	-0.03%	↓	-1.94%	
52-Weeks Low		96,567.24						

Economic Indicators		Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (₹/\$)		1455.17	1466.65	↓	-0.79%	5.54%	1-Month	16.06% ↑ 0.10%
Exchange Rate - Parallel (₹/\$)		1485.00	1490	↓	-0.34%	9.73%	3-Month	16.41% ↑ 0.04%
Monetary Policy Rate (MPR)		27.00%	27.00%	→	0.00%	-0.50%	6-Month	17.38% ↑ 0.37%
Crude Oil Price (\$/Barrel)		63.79	62.73	↑	1.69%	-14.54%	9-Month	17.82% ↑ 0.09%
Foreign Reserve (\$Bn)		42.58	42.57	↑	0.00%	4.15%	12-Month	18.32% ↑ 0.20%
Inflation Rate		20.12%	20.12%	→	0.00%	-14.48%		

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

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