ATLASS PORTFOLIOS LIMITED
Trading Licence Holder of the Nigerian Exchange

THE NIGERIAN EQUITY MARKET SUMMARY

Tuesday, November 25, 2025

Local Bourse Edges Up to Halt 6-Day Retreat as CBN Retains MPR at 27.00%

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	143,763.13	143,614.61	0.10%
Total Market Cap.	₦'Trillion	91.44	91.35	0.10%
Total Volume Traded	Million	556.15	683.40	-18.62%
Total Value Traded	₦'Million	18,713.87	28,369.79	-34.04%
Deals		19,500	23,864	-18.29%

The Nigerian equity market closed in positive territory today, halting the 6-day retreat, as key market performance indicators (the NGX-ASI and Market Capitalization) each increased by 0.10%. The uptick was primarily driven by renewed buying interest in selective stocks across key sectors as cautious trading continues. Notable gainers are NCR, IKEJAHOTEL, STERLINGNG, PRESTIGE, ROYALEX, among others. Consequently, market index (All-Share Index) increased by 148.52 basis points today, representing an increase of 0.10% to close at 143,763.13, while the Market Capitalization also increased by ₦94.46 billion, representing an increase of 0.10%, to close at ₦91.44 trillion. Meanwhile, the Monetary Policy Rate (MPR) remains unchanged at 27.00%.

However, market activities were down today as the Total Volume of trades and the Total Value traded declined by -18.62% and -34.04% respectively. Approximately 556.15 million units valued at ₦18,713.87 million were transacted across 19,500 deals. As regards volume, FIRSTHOLDCO emerged the most traded by generating 16.95%, followed by ACCESSCORP (14.79%), FIDELITYBK (7.56%), FCMB (6.88%), and UBA with 5.78%. On value traded, STANBIC generated 17.20% of the total value of trade, thereby making it the highest traded on the exchange.

Furthermore, on the best performers' chart, NCR led by generating +9.98%, followed by IKEJAHOTEL (+9.86%), PRESTIGE (+9.56%), EUNISELL (+9.49%), STERLINGNG (+8.96%), DAARCOMM (+8.79%), and twenty others. A total of nineteen (19) stocks depreciated. With a price depreciation of -10.00%, both CAVERTON and UNIONDICON topped the worst performers' chart, followed by SUNUASSUR (-4.78%), LASACO (-4.58%), MANSARD (-4.23%), and NSLTECH (-3.75%). Hence, the market breadth closed on a positive note as there were 26 gainers and 19 losers.

Finally, the market sectoral performance was at par today as two out of the major market sectors appreciated while two declined. The Banking sector led by an increase of +0.38%, followed by the Consumer goods sector (+0.01%). The Insurance sector and the Oil & Gas sector declined by -0.84% and -0.17% respectively while the Industrial goods sector remained unchanged (0.00%).

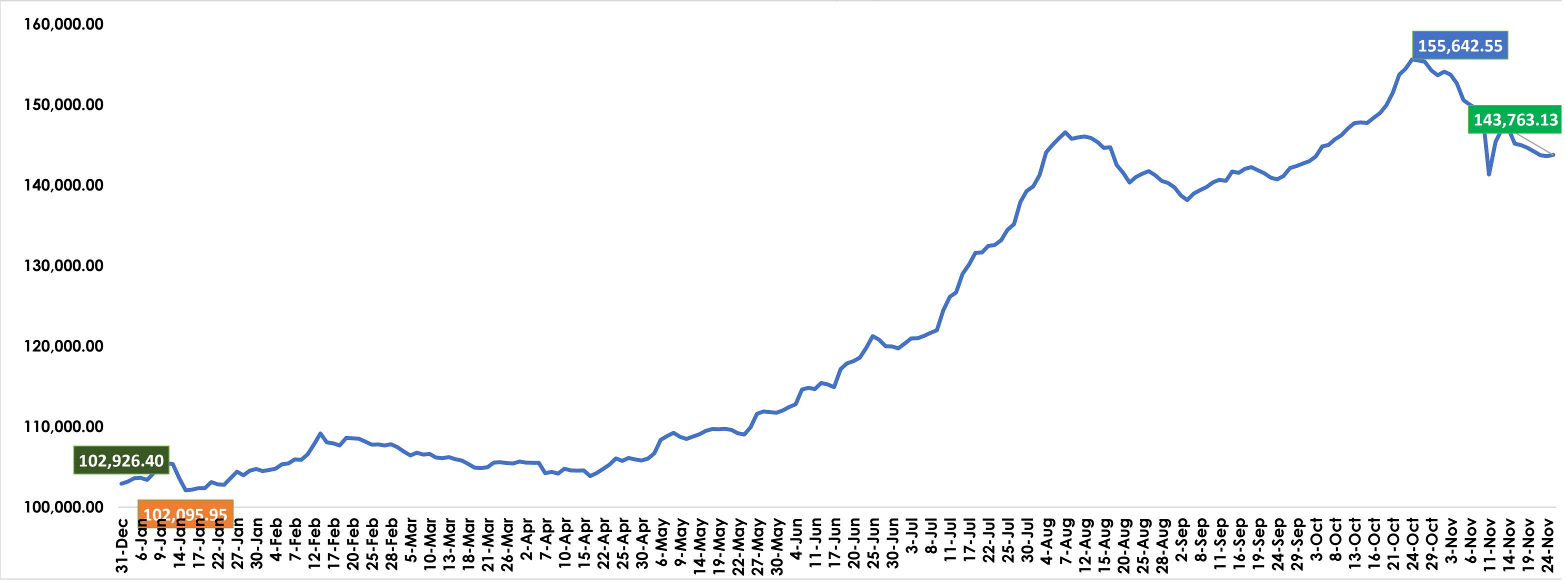
Best 10 Performers	OPEN (₦)	Close (₦)	%Change
NCR	41.10	45.20	9.98%
IKEJAHOTEL	20.80	22.85	9.86%
PRESTIGE	1.36	1.49	9.56%
EUNISELL	79.00	86.50	9.49%
STERLINGNG	6.70	7.30	8.96%
DAARCOMM	0.91	0.99	8.79%
ROYALEX	1.84	1.99	8.15%
NAHCO	99.15	106.50	7.41%
UACN	71.10	76.20	7.17%
LIVESTOCK	6.05	6.45	6.61%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
CAVERTON	5.50	4.95	-10.00%
UNIONDICON	7.00	6.30	-10.00%
SUNUASSUR	4.60	4.38	-4.78%
LASACO	2.62	2.50	-4.58%
MANSARD	13.00	12.45	-4.23%
NSLTECH	0.80	0.77	-3.75%
GUINEAINS	1.15	1.11	-3.48%
REGALINS	1.08	1.05	-2.78%
WEMABANK	18.80	18.30	-2.66%
OANDO	40.00	39.00	-2.50%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
FIRSTHOLDCO	Banking	93,716,871	16.95%
ACCESSCORP	Banking	81,763,675	14.79%
FIDELITYBK	Banking	41,793,258	7.56%
FCMB	Banking	38,027,648	6.88%
UBA	Banking	31,950,954	5.78%
STANBIC	Banking	30,559,141	5.53%
GTCO	Banking	26,186,278	4.74%
ELLAHLAKES	Agriculture	19,030,739	3.44%
NEM	Insurance	13,926,779	2.52%
REGALINS	Insurance	13,669,326	2.47%

Top 10 Traders By Value		Value (₦)	% of Mkt Value
STANBIC	Banking	3,207,253,354.90	17.20%
FIRSTHOLDCO	Banking	2,908,791,363.90	15.60%
GTCO	Banking	2,227,572,210.10	11.95%
MTNN	Telecom	1,932,332,590.30	10.36%
ACCESSCORP	Banking	1,689,371,100.60	9.06%
UBA	Banking	1,151,071,152.50	6.17%
FIDELITYBK	Banking	796,389,090.35	4.27%
ZENITHBANK	Banking	589,291,472.40	3.16%
ARADEL	Oil & Gas	397,497,763.50	2.13%
FCMB	Banking	386,755,651.25	2.07%

NGX-ASI Performance (YTD)



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Market Performance History		
A-Day Change	↑	0.10%
Week-on-Week	↓	-0.84%
Month-to Date	↑	0.74%
Quarter-to-Date	↑	0.74%
Year-to-Date	↑	39.68%
52-Weeks High		155,640.55
52-Weeks Low		97,233.07

Sector Indices		A-Day Change		YTD % Change
NGX-30	↑	0.02%	↑	37.95%
Banking	↑	0.38%	↑	26.70%
Consumer Goods	↑	0.01%	↑	98.93%
Industrial Goods	→	0.00%	↑	46.52%
Insurance	↓	-0.84%	↑	48.44%
Oil & Gas	↓	-0.17%	↓	-0.41%

Economic Indicators	Today	Previous Day		A-Day Change		YTD % Change
Exchange Rate - I&E (₦/$)	1453.84	1456.72	↓	-0.20%	↑	5.63%
Exchange Rate - Parallel (₦/$)	1450.00	1455.00	↓	-0.34%	↑	11.85%
Monetary Policy Rate (MPR)	27.00%	27.00%	→	0.00%	↓	-0.50%
Crude Oil Price ($/Barrel)	62.47	62.05	↑	0.68%	↓	-16.30%
Foreign Reserve ($'Bn)	44.26	44.18	↑	0.18%	↑	8.27%
Inflation Rate	16.05%	16.05%	→	0.00%	↓	-18.55%

NTB True Yield	Closed		A-day Change
1-Month	16.47%	↓	-0.10%
3-Month	16.34%	↑	0.02%
6-Month	17.24%	↑	0.27%
9-Month	17.88%	↓	-0.04%
12-Month	18.78%	↑	0.36%

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

Contact Information aadabale@atlassportfolios.com research@atlassportfolios.com