

**Daily Market Recap**

Wednesday, 6 August 2025

**STOCK MARKET HIGHLIGHTS**

NGX Statistics	05-Aug-25	06-Aug-25	Change %	YTD (%)
NGX All- Share Index	144,796.37	145,813.86	0.70	41.67
Market Capitalization (N'Trn)	91.61	92.25	0.70	46.98
Market Cap. (\$'Bn)	59.80	60.17	0.63	
Total Value Traded (N'Bn)	22.82	32.62	42.93	
Total Value Traded (\$'Mn)	14.90	21.28	42.82	
Total Volume Traded (Mn)	1,027.92	2,698.35	162.51	
Number of Deals	38,922	35,101	-9.82	
Market Breadth	2.04x			

Sectors	05-Aug-25	06-Aug-25	Change%	YTD (%)
Banks	1,606.32	1,600.51	-0.36	47.58%
Insurance	986.33	1,083.66	9.87	50.93%
Consumer Goods	3,109.98	3,097.18	-0.41	78.86%
Oil and Gas	2,431.25	2,454.51	0.96	-9.50%
Industrial Goods	5,524.04	5,681.38	2.85	59.05%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
JAIZBANK	4.30	4.73	0.43	10.00%
MANSARD	11.00	12.10	1.10	10.00%
NEM	27.00	29.70	2.70	10.00%
SCOA	5.00	5.50	0.50	10.00%
HMCALL	4.40	4.84	0.44	10.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
NGXGROUP	70.00	63.00	-7.00	-10.00%
UACN	100.00	90.00	-10.00	-10.00%
UHOMEIT	64.00	57.60	-6.40	-10.00%
LIVINGTRUST	5.94	5.35	-0.59	-9.93%
MULTIVERSE	10.85	9.80	-1.05	-9.68%

Source: NGX, SCM Capital Research

**NASD OTC Snapshot**

Statistics	05-Aug-25	06-Aug-25	Change %	YTD (%)
NSI	3,676.68	3,674.53	-0.06	22.38
Market Capitalization (N'Bn)	2,153.13	2,151.87	-0.06	109.03
Value Traded (N'000)	26,150.41	29,067.92	11.16	
Volume Traded	979,860	22,949,729	2242.14	
Deals	35	57	62.86	

Source: NASD, SCM Capital Research

**Bargain hunting continues:**

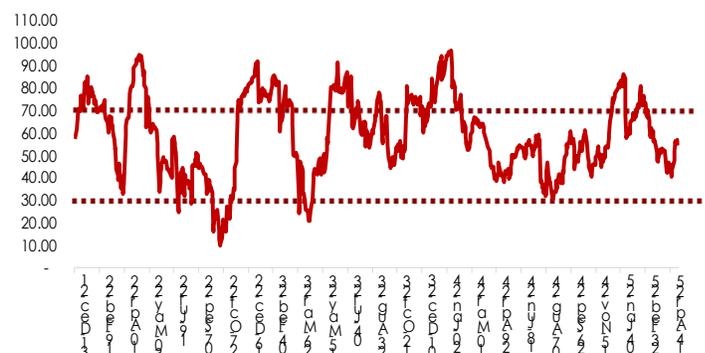
At the close of trading today, the NGX-ASI advanced by 0.70% to close at 145,813.86 points on the back of buying interest in STERLINGNG (+9.97%), OANDO (+9.46%), BUACEMENT (+7.33%), FIRSTHOLDCO (+1.25%), and GTCO (+0.40%). Consequently, year-to-date return increased to 41.67%, while market capitalization rose by N643.74 billion to N92.25 trillion.

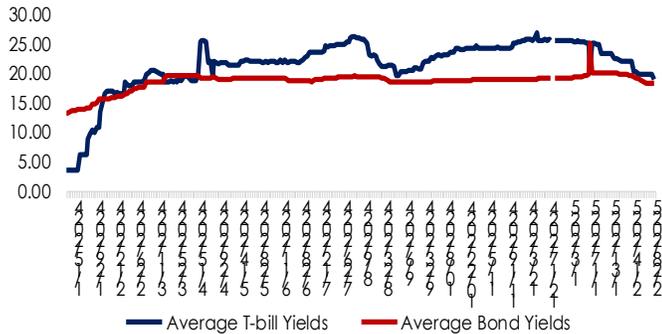
Activity level strengthened as volume and value traded rose by 162.51% and 42.93% respectively. A total of 2.70 billion units of shares valued at N32.62 billion were exchanged in 35,101 deals. CONHALLPLC (+9.97%) topped the volume chart with 1.02 billion units, while ZENITHBANK (-1.98%) led the value charts with 60.35 millions units of shares traded in deals worth N4.55 billion. The market breadth (advance/decline ratio) waned from 2.36x to 2.04x, reflective of 53 gainers against 26 decliners.

Performance across tracked indices was largely bullish as the Insurance, Industrial Goods, and Oil & Gas indices advanced by 9.87%, 2.85%, and 0.96% respectively, driven by gains recorded in CONHALLPLC (+9.97%), BUACEMENT (+7.33%), and OANDO (+9.46%). On the flipside, the Consumer Goods and Banking indices moderated by 0.41% and 0.36% respectively, owing to sell-offs in DANGSUGAR (-0.81%), and ZENITHBANK (-1.98%).

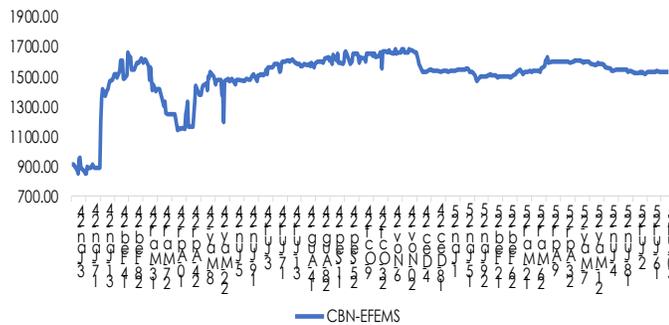
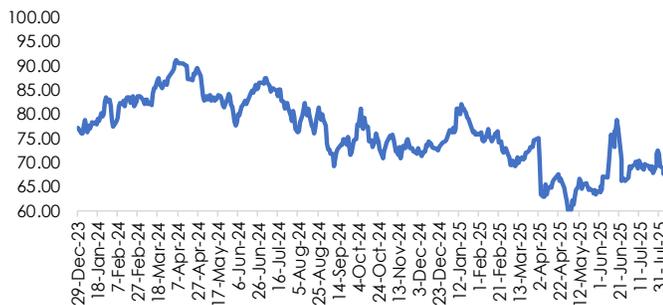
**OUTLOOK**

*This week, we expect continued buying interest in fundamentally sound stocks, driven by strong earnings releases.*

**RSI of NGX All Share Index**


**Fixed Income Yield Trend**


Source: NGX, SCM Capital Research

**Foreign Exchange Rates Trend**

**Brent Crude Oil Price**

**Fixed income market summary**

T-bills	6-Aug-25 Current	5-Aug-25 Previous	Change(bp)
3m	16.12	16.13	↓ 0.01
6m	17.69	17.70	↓ 0.01
12m	18.56	18.57	↓ 0.01

**FGN Bonds**

	Current	Previous	Change(bp)
3yrs	16.87	16.87	→ 0.00
5yrs	17.02	17.02	→ 0.00
7yrs	17.06	17.06	→ 0.00
10yrs	15.56	15.56	→ 0.00

**FGN EuroBonds**

	Current	Previous	Change(bp)
3yrs	7.43	7.42	↑ 0.01
5yrs	8.06	8.05	↑ 0.01
7yrs	8.32	8.30	↑ 0.02
25yrs	9.69	9.65	↑ 0.04

**FX**

	Current	Previous	Change(N)
CBN - EFEMS	1533.10	1531.95	↓ 1.15

Source: FMDQ, CBN, SCM Capital Research

**Money Market**

At the secondary NTB market, average yield moderated by 4bps to settle at 17.83%. The O/N rate fell by 50bps to settle at 27.00%.

**Fixed Income**

At the secondary Bond market, yield declined by 2bps to an average of 16.26%.

**Currency**

The Naira depreciated by 0.08% at the EFEMS, to close at N1,533.10/USD.

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