

Daily Market Recap

Tuesday, 12 August 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	11-Aug-25	12-Aug-25	Change %	YTD (%)
NGX All- Share Index	145,880.77	146,055.89	0.12	41.90
Market Capitalization (N'Trn)	92.29	92.41	0.12	47.23
Market Cap. (\$'Bn)	60.18	60.16	-0.03	
Total Value Traded (N'Bn)	19.40	24.22	24.84	
Total Value Traded (\$'Mn)	12.65	15.77	24.65	
Total Volume Traded (Mn)	2,115.72	1,277.20	-39.63	
Number of Deals	40,425	31,146	-22.95	
Market Breadth	1.72x			

Sectors	11-Aug-25	12-Aug-25	Change%	YTD (%)
Banks	1,613.90	1,610.42	-0.22	48.49%
Insurance	1,372.40	1,497.50	9.12	108.57%
Consumer Goods	3,253.91	3,238.74	-0.47	87.03%
Oil and Gas	2,427.15	2,422.59	-0.19	-10.67%
Industrial Goods	5,416.31	5,463.16	0.86	52.94%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
ABCTRANS	4.50	4.95	0.45	10.00%
PRESTIGE	2.00	2.20	0.20	10.00%
SUNUASSUR	5.50	6.05	0.55	10.00%
TIP	13.20	14.52	1.32	10.00%
WAPIC	3.70	4.07	0.37	10.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
JULI	10.00	9.00	-1.00	-10.00%
UNILEVER	79.20	71.30	-7.90	-9.97%
CUSTODIAN	41.90	37.90	-4.00	-9.55%
ACADEMY	9.00	8.30	-0.70	-7.78%
MAYBAKER	19.50	18.00	-1.50	-7.69%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	11-Aug-25	12-Aug-25	Change %	YTD (%)
NSI	3,668.39	3,614.69	-1.46	20.38
Market Capitalization (N'Bn)	2,194.88	2,162.75	-1.46	110.09
Value Traded (N'000)	10,494.93	113,500.11	981.48	
Volume Traded	751,813	31,857,917	4137.48	
Deals	40	37	-7.50	

Source: NASD, SCM Capital Research

Bulls dominate local bourse:

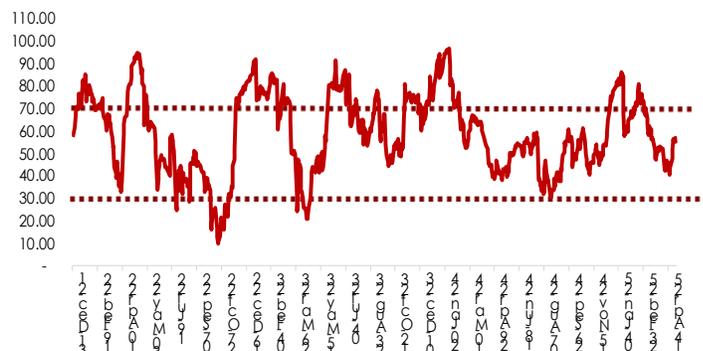
At the end of today's trading session, the NGX-ASI closed 0.12% higher to settle at 146,055.89 points. The market direction was driven by buying interests in the Insurance counters - PRESTIGE (+10.00%), SUNUASSUR (+10.00%), MANSARD (+10.00%), amongst others. Consequently, year-to-date return increased to 41.90%, while market capitalization rose by N110.78 billion to N92.41 trillion.

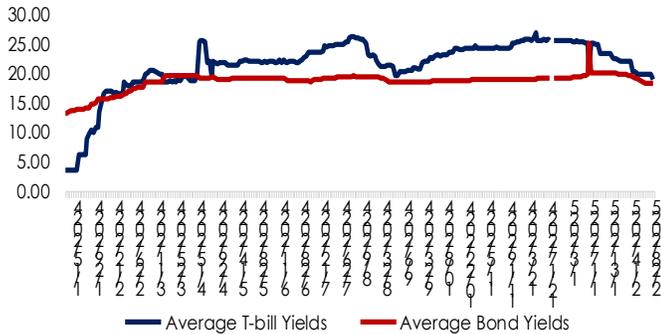
Activity level was mixed as volume traded declined by 39.63% to 1.28 billion units traded, while value traded advanced by 24.84% to N24.22 billion. LASACO (+9.90%) topped the volume chart with 107.22 million units, while GTCO (-0.85%), led the value chart with 26.50 million units of shares traded in deals worth N2.62 billion. The market breadth (advance/decline ratio) improved from 1.14x to 1.72x, reflective of 50 gainers against 29 decliners.

Performance across tracked indices was largely bearish as the Consumer Goods, Banking and Oil & Gas indices moderated by 0.47%, 0.22% and 0.19% respectively, on the back of sell-offs in DANGSUGAR (-3.39%), GTCO (-0.85%), and OANDO (-1.89%). On the flipside, the Insurance, and Industrial Goods indices rose by 9.12% and 0.86% respectively, driven by price appreciation in SUNUASSUR (+10.00%) and WAPCO (+6.06%).

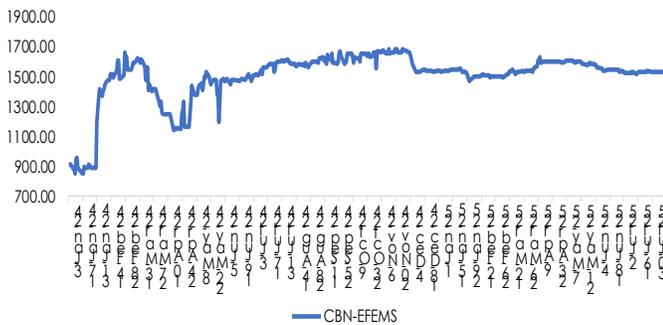
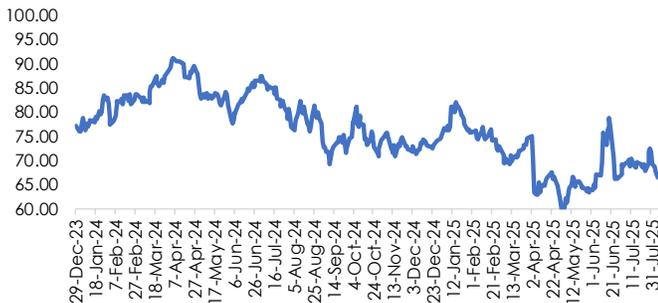
OUTLOOK

This week, we expect investors to remain cautious ahead of the July inflation report.

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	12-Aug-25 Current	11-Aug-25 Previous	Change(bp)
3m	16.72	16.73	↓ 0.01
6m	18.66	18.81	↓ 0.15
12m	19.49	19.50	↓ 0.01

FGN Bonds

	Current	Previous	Change(bp)
3yrs	16.86	16.86	↓ 0.00
5yrs	17.13	17.05	↑ 0.07
7yrs	16.94	17.06	↓ 0.12
10yrs	15.56	15.56	→ 0.00

FGN EuroBonds

	Current	Previous	Change(bp)
3yrs	7.24	7.34	↓ 0.10
5yrs	7.94	8.01	↓ 0.07
7yrs	8.19	8.23	↓ 0.04
25yrs	9.57	9.59	↓ 0.02

FX

	Current	Previous	Change(N)
CBN - EFEMS	1535.93	1533.57	↓ 2.36

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield fell by 2bps to settle at 18.04%. The O/N rate advanced by 240bps to settle at 29.40%.

Fixed Income

At the secondary Bond market, yield closed closed flat at 16.30%.

Currency

The Naira depreciated by 0.15% at the EFEMS, to close at N1,533.93/USD.

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