

Daily Market Recap

Wednesday, 13 August 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	12-Aug-25	13-Aug-25	Change %	YTD (%)
NGX All- Share Index	146,055.89	145,864.80	-0.13	41.72
Market Capitalization (N'Trn)	92.41	92.28	-0.13	47.04
Market Cap. (\$'Bn)	60.16	60.04	-0.21	
Total Value Traded (N'Bn)	24.22	20.18	-16.66	
Total Value Traded (\$'Mn)	15.77	13.13	-16.72	
Total Volume Traded (Mn)	1,277.20	1,341.73	5.05	
Number of Deals	31,146	30,737	-1.31	
Market Breadth	2.52x			

Sectors	12-Aug-25	13-Aug-25	Change%	YTD (%)
Banks	1,610.42	1,601.89	-0.53	47.70%
Insurance	1,497.50	1,616.47	7.94	125.14%
Consumer Goods	3,238.74	3,209.14	-0.91	85.32%
Oil and Gas	2,422.59	2,425.56	0.12	-10.56%
Industrial Goods	5,463.16	5,445.27	-0.33	52.44%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CAVERTON	7.20	7.92	0.72	10.00%
FINCOCOA	6.30	6.93	0.63	10.00%
LEARNAFRCA	7.00	7.70	0.70	10.00%
RTBRISCOE	3.40	3.74	0.34	10.00%
PRESTIGE	2.20	2.42	0.22	10.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
THOMASWY	3.80	3.42	-0.38	-10.00%
UPDC	8.69	8.00	-0.69	-7.94%
LEGENDINT	5.98	5.60	-0.38	-6.35%
BERGER	34.10	32.00	-2.10	-6.16%
CHAMPION	17.38	16.38	-1.00	-5.75%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	12-Aug-25	13-Aug-25	Change %	YTD (%)
NSI	3,614.69	3,591.88	-0.63	19.62
Market Capitalization (N'Bn)	2,162.75	2,149.10	-0.63	108.76
Value Traded (N'000)	113,500.11	925,617.14	715.52	
Volume Traded	31,857,917	12,344,792	-61.25	
Deals	37	29	-21.62	

Source: NASD, SCM Capital Research

Stock market reverse gains:

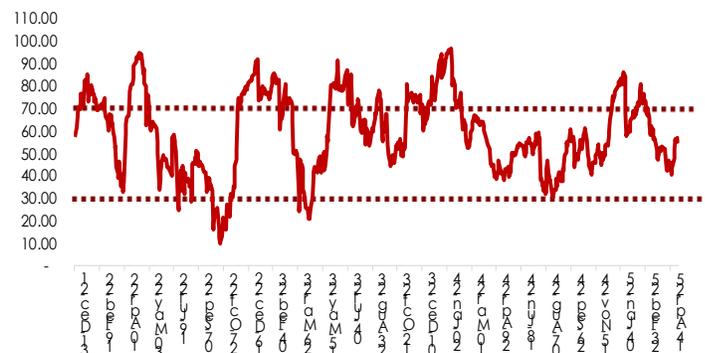
The stock market closed on a bearish note at the end of today's trading session, as sell-offs in WAPCO (-2.14%), ZENITHBANK (-1.96%), UBA (-1.93%), GTCO (-1.31%), ARADEL (-0.19%) amongst others, dragged the NGX-ASI down by 0.13% to settle at 145,864.80 points. Consequently, year-to-date return decreased to 41.72%, while market capitalization declined by N120.91 billion to N92.28 trillion.

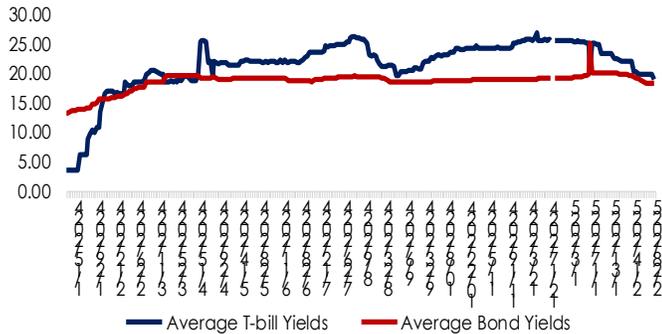
Activity level was mixed as volume traded advanced by 5.05% to 1.34 billion units traded, while value traded fell by 16.66% to N20.18 billion. UNIVINSURE (+9.77%) topped the volume chart with 193.43 million units, while ACCESSCORP (+0.18%), led the value chart with 84.99 million units of shares traded in deals worth N2.35 billion. The market breadth (advance/decline ratio) improved from 1.72x to 2.52, reflective of 53 gainers against 21 decliners.

Performance across tracked indices was largely bearish as the Consumer Goods, Banking and Industrial Goods indices moderated by 0.91%, 0.53% and 0.33% respectively, on the back of losses recorded in HONYFLOUR (-1.03%), ZENITHBANK (-1.96%), and WAPCO (-2.14%). On the flipside, the Insurance, and Oil & Gas indices rose by 7.94% and 0.12% respectively, driven by price appreciation in AIICO (+9.93%) and OANDO (+1.92%).

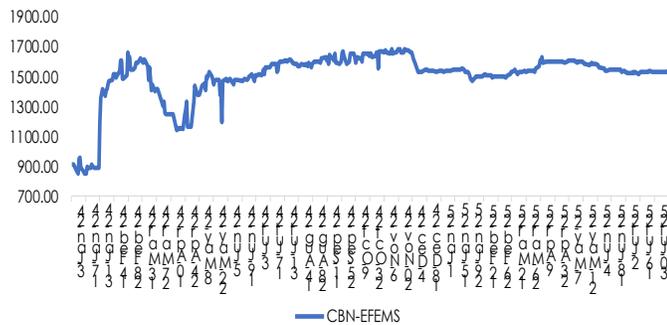
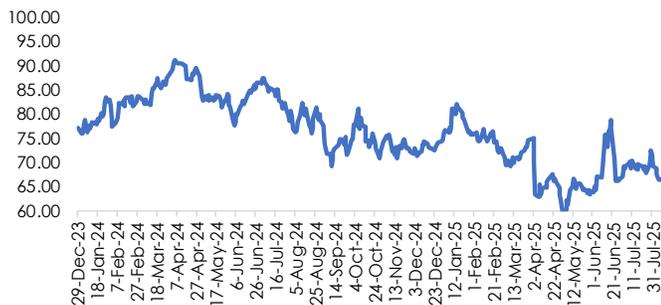
OUTLOOK

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	13-Aug-25 Current	12-Aug-25 Previous	Change(bp)
3m	16.72	16.72	↓ 0.01
6m	18.57	18.66	↓ 0.09
12m	19.47	19.49	↓ 0.01

FGN Bonds	Current	Previous	Change(bp)
3yrs	16.86	16.86	→ 0.00
5yrs	17.21	17.13	↑ 0.08
7yrs	16.94	16.94	→ 0.00
10yrs	15.56	15.56	→ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	7.13	7.24	↓ 0.11
5yrs	7.79	7.94	↓ 0.15
7yrs	8.04	8.19	↓ 0.15
25yrs	9.41	9.57	↓ 0.16

FX	Current	Previous	Change(N)
CBN - EFEMS	1537.09	1535.93	↓ 1.16

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield rose by 1bp to settle at 18.05%. The O/N rate advanced by 310bps to settle at 32.50%.

Fixed Income

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

Currency

The Naira depreciated by 0.08% at the EFEMS, to close at N1,537.09/USD.

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