

**Daily Market Recap**

Friday, 13 February 2026

**STOCK MARKET HIGHLIGHTS**

NGX Statistics	12-Feb-26	13-Feb-26	Change %	YTD (%)
NGX All- Share Index	178,625.63	182,313.08	2.06	17.16
Market Capitalization (N'Trn)	114.66	117.03	2.06	17.76
Market Cap. (\$'Bn)	85.00	86.45	1.71	
Total Value Traded (N'Bn)	28.40	52.63	85.31	
Total Value Traded (\$'Mn)	21.06	38.88	84.66	
Total Volume Traded (Mn)	698.30	936.25	34.08	
Number of Deals	50,865	49,888	-1.92	
Market Breadth	1.61x			

Sectors	12-Feb-26	13-Feb-26	Change%	YTD (%)
Banks	1,734.56	1,777.73	2.49	17.28%
Insurance	1,298.33	1,306.60	0.64	9.86%
Consumer Goods	4,234.00	4,267.00	0.78	7.33%
Oil and Gas	3,677.96	3,753.29	2.05	40.56%
Industrial Goods	6,660.54	6,689.71	0.44	17.85%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CORNERST	5.80	6.38	0.58	10.00%
INFINITY	9.00	9.90	0.90	10.00%
MCNICHOLS	7.00	7.70	0.70	10.00%
NESTLE	2,420.00	2,662.00	242.00	10.00%
UNIONDICON	19.00	20.90	1.90	10.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
SKYAVN	150.00	135.00	-15.00	-10.00%
GUINNESS	349.90	315.00	-34.90	-9.97%
OMATEK	3.30	2.99	-0.31	-9.39%
NPFMCRFBK	5.99	5.60	-0.39	-6.51%
ETRANZACT	24.50	22.95	-1.55	-6.33%

Source: NGX, SCM Capital Research

**NASD OTC Snapshot**

Statistics	12-Feb-26	13-Feb-26	Change %	YTD (%)
NSI	3,940.90	3,974.77	0.86	12.16
Market Capitalization (?'Bn)	2,357.93	2,378.20	0.86	12.16
Value Traded (?'000)	53,858.30	703,629.57	1206.45	
Volume Traded	8,616,575	9,436,615	9.52	
Deals	42	45	7.14	

Source: NASD, SCM Capital Research

**Equities**
**Equities Market Closes the Week Positive**

The equities market closed the week on a positive note, as the NGX All-Share Index (NGX-ASI) advanced by 2.06% to 182,313.08 points. Consequently, market capitalisation increased by N2.37 trillion to N117.03 trillion, bringing the year-to-date return to 17.16%.

Having gained in all trading sessions this week, the broad index closed 6.16% higher week-on-week. Gains recorded in NESTLE (+21.00% w/w), MTNN (+14.32% w/w), WAPCO (+12.87% w/w), PRESCO (+12.43% w/w), GTCO (+11.72% w/w), and OKOMUOIL (+9.99% w/w) kept the market in positive territory.

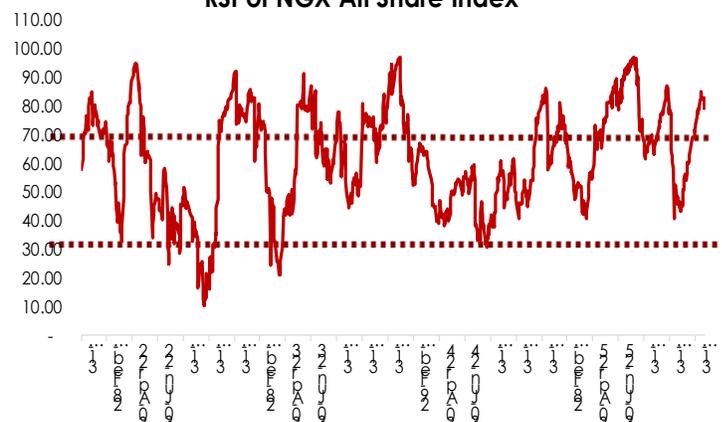
Market activity strengthened week-on-week, as both traded volume and value advanced by 20.50% and 50.35%, respectively. A total of 4.65 billion shares, valued at N193.33 billion were exchanged across 286,750 deals.

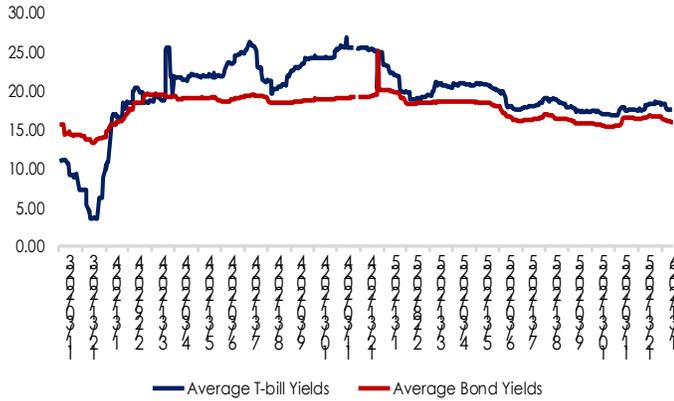
For today, FIRSTHOLDCO (+0.31%) led the volume chart with 106.34 million units traded, while PRESCO (+6.74%) topped the value chart with transactions worth N7.93 billion.

Investor sentiment, as measured by market breadth (advance/decline ratio), improved to 1.61x from 1.31x, reflecting 53 gainers against 33 decliners.

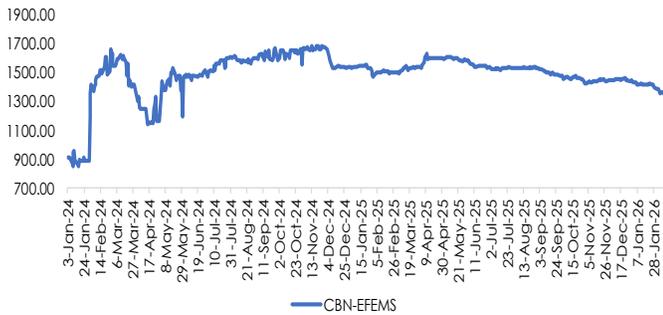
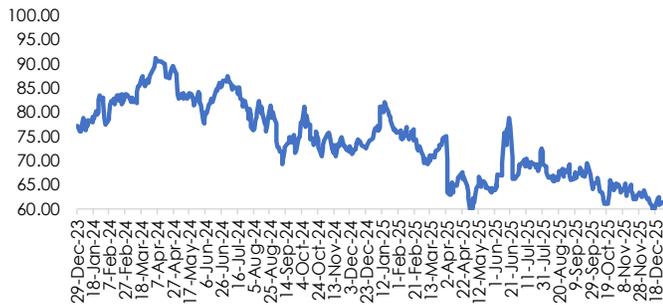
**OUTLOOK**

Market momentum is expected to remain skewed towards the buy side in the coming week, as investors digest ongoing earnings releases and position ahead of dividend announcements. However, following the recent rally, selective profit-taking may surface in some tickers, prompting sector rotation into stocks delivering

**RSI of NGX All Share Index**


**Fixed Income Yield Trend**


Source: FMDQ, SCM Capital Research

**Foreign Exchange Rates Trend**

**Brent Crude Oil Price**

**Fixed income market summary**

T-bills	13-Feb-26	12-Feb-26	Change(bp)
3m	16.74	16.75	↓ 0.01
6m	17.42	17.43	↓ 0.01
12m	18.98	18.92	↑ 0.06

FGN Bonds	Current	Previous	Change(bp)
3yrs	16.04	16.04	→ 0.00
5yrs	16.50	16.50	→ 0.00
7yrs	16.44	16.44	→ 0.00
10yrs	16.42	16.42	→ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	6.00	5.94	↑ 0.06
5yrs	6.61	6.57	↑ 0.04
7yrs	6.94	6.90	↑ 0.04
25yrs	8.34	8.32	↑ 0.02

FX	Current	Previous	Change(N)
CBN - EFEMS	1353.66	1348.95	↓ 4.71

Source: FMDQ, CBN, SCM Capital Research

**Money Market**

At the secondary NTB market, average yield closed flat at 17.62%. The O/N rate rose by 3bps to settle at 22.78%.

**Fixed Income**

At the secondary Bond market, average yield closed flat at 16.00%.

**Currency**

The Naira at the EFEMS depreciated by 0.35% to close at N1,353.66/USD.

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