Daily Market Recap

Thursday, 13 August 2026

STOCK MARKET HIGHLIGHTS

NGX Statistics	12-Aug-26	13-Aug-26	Change %	YTD (%)
NGX All- Share Index	243,967.09	243,017.38	-0.39	56.17
Market Capitalization (N'Trn)	157.49	156.88	-0.39	57.87
Market Cap. ($'Bn)	115.39	115.30	-0.07	
Total Value Traded (N'Bn)	20.84	50.58	142.73	
Total Value Traded ($'Mn)	15.27	37.17	143.50	
Total Volume Traded (Mn)	1,455.10	4,237.72	191.23	
Number of Deals	39,031	41,389	6.04	
Market Breadth	0.39x			

Sectors	12-Aug-26	13-Aug-26	Change%	YTD (%)
Banks	2,560.67	2,553.87	-0.27	68.48%
Insurance	1,152.13	1,145.85	-0.55	-3.66%
Consumer Goods	4,106.48	4,056.39	-1.22	2.04%
Oil and Gas	5,238.56	5,234.92	-0.07	96.05%
Industrial Goods	10,457.71	10,379.12	-0.75	82.84%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
INTENEGINS	4.40	4.84	0.44	10.00%
JOHNHOLT	9.10	10.00	0.90	9.89%
TRANSEXPR	2.36	2.59	0.23	9.75%
SUNUASSUR	3.30	3.58	0.28	8.48%
NEM	32.00	34.00	2.00	6.25%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
UNILEVER	131.40	118.30	-13.10	-9.97%
CHELLARAM	11.90	10.75	-1.15	-9.66%
NIDF	163.30	147.70	-15.60	-9.55%
DAARCOMM	1.73	1.57	-0.16	-9.25%
CORNERST	5.50	5.00	-0.50	-9.09%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	12-Aug-26	13-Aug-26	Change %	YTD (%)
NSI	4,531.98	4,544.20	0.27	28.23
Market Capitalization (?'Bn)	2,720.16	2,727.50	0.27	28.64
Value Traded (?'000)	18,666.24	210,839.67	1029.52	
Volume Traded	150,340	1,914,979	1173.77	
Deals	32	34	6.25	

Source: NASD, SCM Capital Research

Equities

Broad-Based Sell-Off Pushes Market Lower

The equities market closed on a bearish note, as sell-offs in CORNERST (-9.09%), INTBREW (-6.36%), ACCESSCORP (-3.28%), ZENITHBANK (-2.24%), OANDO (-1.70%), among others, dragged the NGX-ASI down by 0.39% to settle at 243,017.38 points. Consequently, market capitalisation declined by N613.08 billion to N156.88 trillion, while the year-to-date return eased to 56.17%.

Market activity surged, as both volume and value traded advanced by 191.23% and 142.73%, respectively. A total of 4.24 billion shares, valued at N50.58 billion, were exchanged in 41,389 deals.

CORNERST (-9.09%) led both the volume and value charts, with 3.65 billion shares valued at N18.37 billion.

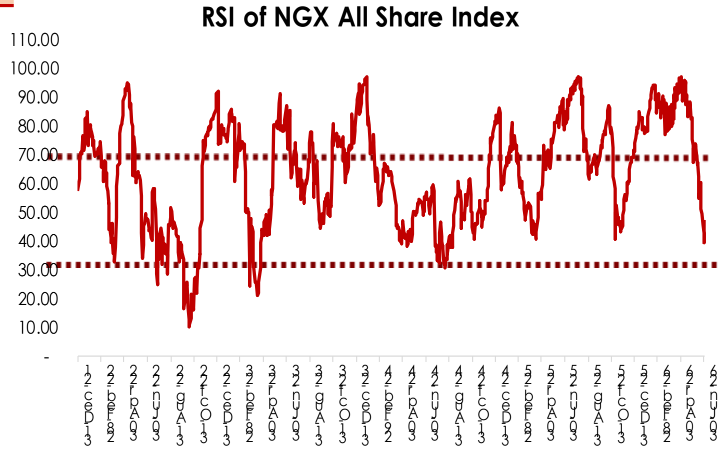
Investor sentiment, as measured by the market breadth (advancers-to-decliners ratio), weakened to 0.39x from 1.00x in the previous session, with 16 advancers and 41 decliners.

Performance across the tracked indices was negative, as the Consumer Goods, Industrial Goods, and Insurance indices declined by 1.22%, 0.75%, and 0.55%, respectively. Similarly, the Banking and Oil & Gas indices fell by 0.27% and 0.07%, respectively.

OUTLOOK

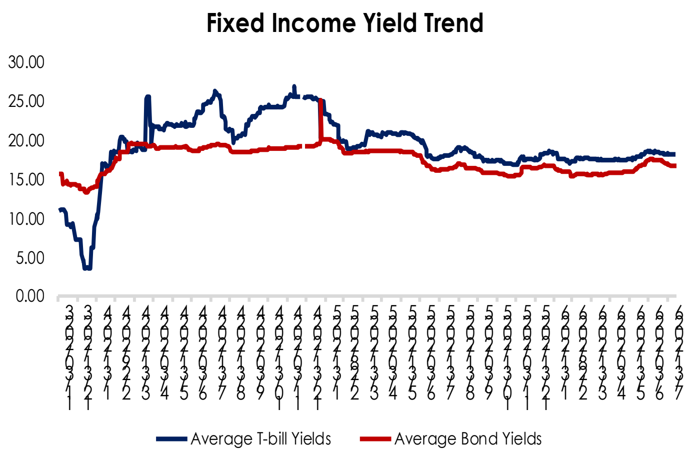
This week, we expect market sentiment to remain cautious as investors position themselves ahead of the release of H1 2026 corporate earnings.

RSI of NGX All Share Index

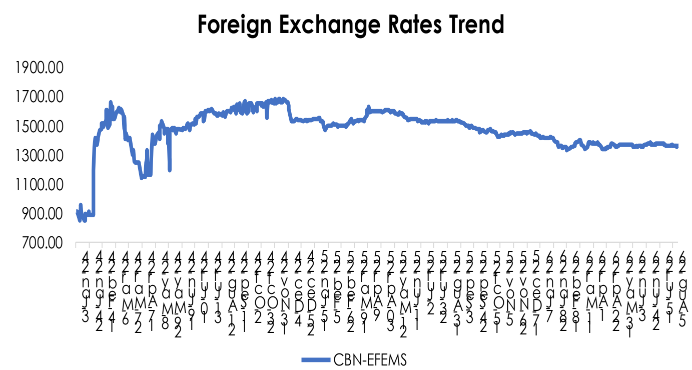


Money Market

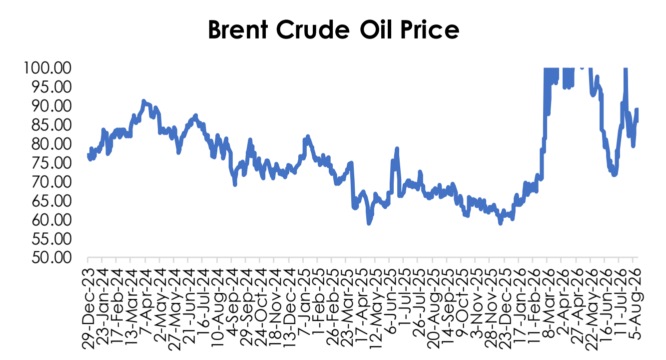
Thursday, 13 August 2026



Source: FMDQ, SCM Capital Research



Source: CBN, SCM Capital Research



Fixed income market summary	13-Aug-26	12-Aug-26	
T-bills	**Current**	**Previous**	**Change(bp)**
3m	17.26	17.27	0.01
6m	18.15	18.16	0.01
12m	20.12	20.13	0.01
FGN Bonds	**Current**	**Previous**	**Change(bp)**
3yrs	17.00	17.00	0.00
5yrs	17.33	17.10	0.23
7yrs	17.38	17.36	0.02
10yrs	17.33	17.33	0.00
FGN EuroBonds	**Current**	**Previous**	**Change(bp)**
3yrs	6.01	6.06	0.05
5yrs	6.55	6.62	0.07
7yrs	6.68	6.70	0.02
25yrs	8.03	8.04	0.01
FX	**Current**	**Previous**	**Change(N)**
CBN - EFEMS	1,360.58	1,364.90	4.32

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield declined by 2bps to settle at 18.21%. The O/N rate rose by 1bps to settle at 22.10%.

Fixed Income

At the secondary Bond market, average yield advanced by 3bps to settle at 16.78%.

Currency

The Naira at the EFEMS appreciated by 0.32% at N1,360.58/USD.

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