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Daily Market Recap

Friday, 14 August 2026

STOCK MARKET HIGHLIGHTS				
NGX Statistics	**13-Aug-26**	**14-Aug-26**	**Change %**	**YTD (%)**
NGX All- Share Index	243,017.38	242,619.20	-0.16	55.91
Market Capitalization (N'Trn)	156.88	156.62	-0.16	57.61
Market Cap. ($'Bn)	115.30	115.36	0.05	
Total Value Traded (N'Bn)	50.58	45.31	-10.41	
Total Value Traded ($'Mn)	37.17	33.37	-10.22	
Total Volume Traded (Mn)	4,237.72	1,413.62	-66.64	
Number of Deals	41,389	39,072	-5.60	
Market Breadth	0.70x			

Sectors	13-Aug-26	14-Aug-26	Change%	YTD (%)
Banks	2,553.87	2,548.02	-0.23	68.09%
Insurance	1,145.85	1,128.74	-1.49	-5.09%
Consumer Goods	4,056.39	4,037.91	-0.46	1.57%
Oil and Gas	5,234.92	5,201.81	-0.63	94.81%
Industrial Goods	10,379.12	10,379.10	-0.00	82.84%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
INTENEGINS	4.84	5.32	0.48	9.92%
TRANSEXPR	2.59	2.84	0.25	9.65%
GUINEAINS	0.75	0.80	0.05	6.67%
REGALINS	0.80	0.85	0.05	6.25%
JAPAULGOLD	2.80	2.95	0.15	5.36%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
FTGINSURE	2.90	2.63	-0.27	-9.31%
OMATEK	1.66	1.51	-0.15	-9.04%
JOHNHOLT	10.00	9.10	-0.90	-9.00%
RTBRISCOE	12.60	11.60	-1.00	-7.94%
DANGSUGAR	70.00	64.55	-5.45	-7.79%

Source: NGX, SCM Capital Research

NASD OTC Snapshot				
Statistics	**13-Aug-26**	**14-Aug-26**	**Change %**	**YTD (%)**
NSI	4,544.20	4,465.83	-1.72	26.02
Market Capitalization (?'Bn)	2,727.50	2,680.46	-1.72	26.42
Value Traded (?'000)	210,839.67	375,741.42	78.21	
Volume Traded	1,914,979	3,156,109	64.81	
Deals	34	46	35.29	

Source: NASD, SCM Capital Research

Equities

Equities market closes the week on a bearish note

The equities market closed the week on a bearish note, as the NGX-ASI declined by 0.16% to settle at 242,619.20 points. Consequently, market capitalisation decreased by N257.06 billion to N156.62 trillion, while the year-to-date return eased to 55.91%.

Having recorded losses in four out of five trading sessions this week, the benchmark index closed 1.20% lower w/w. Bearish sentiment in DANGSUGAR (-11.58% w/w), BUAFOODS (-10.00% w/w), HBMNG (-7.22% w/w), MTNN (-4.73% w/w), FIRSTHOLDCO (-3.71% w/w), among others, outweighed gains in INTENEGINS (+31.68% w/w), AIRTELAFRI (+8.59% w/w), and WEMABANK (+3.14% w/w).

Market activity surged, as both volume and value traded advanced by 126.76% and 26.61%, respectively. A total of 12.12 billion shares, valued at N176.06 billion, were exchanged across 224,140 deals.

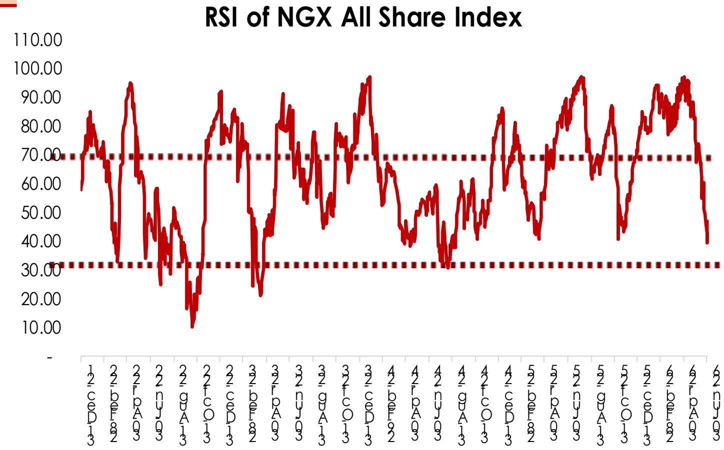
In today's trading session, FTGINSURE (-9.31%) topped the volume chart, with 874.08 million shares traded, while MTNN (0.00%) led the value chart, with 44.59 million shares valued at N31.37 billion.

Investor sentiment, as measured by market breadth (advancers-to-decliners ratio), improved to 0.70x from 0.39x in the previous session, with 21 advancers and 30 decliners.

OUTLOOK

Next 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



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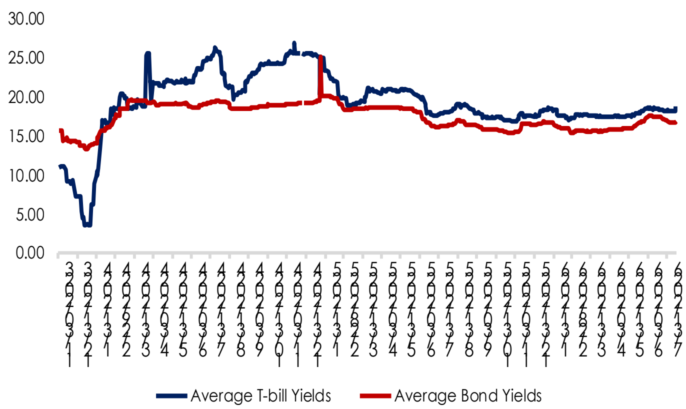
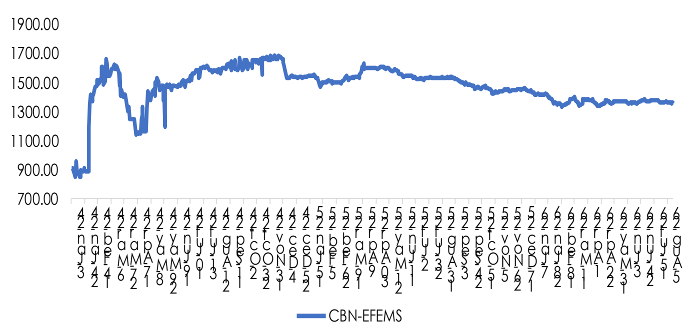
Fixed Income Yield Trend



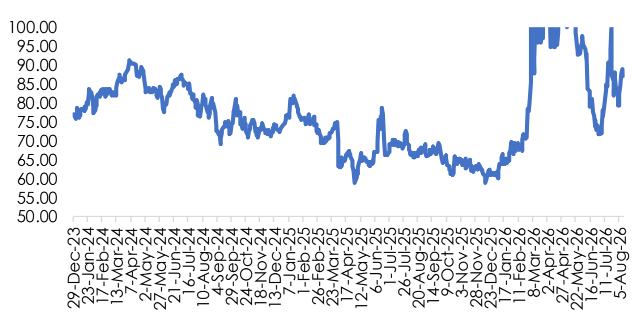
Source: FMDQ, SCM Capital Research

Foreign Exchange Rates Trend



Source: CBN, SCM Capital Research

Brent Crude Oil Price



Fixed income market summary	14-Aug-26	13-Aug-26	
T-bills	**Current**	**Previous**	**Change(bp)**
3m	17.25	17.26	0.01
6m	19.07	18.15	0.92
12m	20.98	20.12	0.86
FGN Bonds	**Current**	**Previous**	**Change(bp)**
3yrs	17.00	17.00	0.00
5yrs	17.37	17.33	0.04
7yrs	17.38	17.38	0.00
10yrs	17.33	17.33	0.00
FGN EuroBonds	**Current**	**Previous**	**Change(bp)**
3yrs	6.00	6.01	0.01
5yrs	6.56	6.55	0.01
7yrs	6.68	6.68	0.00
25yrs	8.04	8.03	0.01
FX	**Current**	**Previous**	**Change(N)**
CBN - EFEMS	1,357.65	1,360.58	2.93

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield declined by 52bps to settle at 18.73%. The O/N rate rose by 14bps to settle at 22.25%.

Fixed Income

At the secondary Bond market, average yield closed flat at 16.78%.

Currency

The Naira at the EFEMS appreciated by 0.22% at N1,357.65/USD.

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