Daily Market Recap

Equity | Fixed Income | FX | Commodity

SCM CAPITAL

Friday, November 6, 2026

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STOCK MARKET HIGHLIGHTS

NGX Statistics	05-Nov-26	06-Nov-26	Change %	YTD (%)
NGX All- Share Index	249,710.59	248,877.22	-0.33	59.93
Market Capitalization (N'Trn)	162.13	161.59	-0.33	62.61
Market Cap. ($'Bn)	120.30	119.81	-0.40	
Total Value Traded (N'Bn)	74.06	26.84	-63.76	
Total Value Traded ($'Mn)	54.95	19.90	-63.78	
Total Volume Traded (Mn)	856.24	377.62	-55.90	
Number of Deals	33,499	32,614	-2.64	
Market Breadth	1.26x			

Sectors	05-Nov-26	06-Nov-26	Change%	YTD (%)
Banks	2,388.23	2,369.84	-0.77	56.34%
Insurance	993.55	1,026.74	3.34	-13.67%
Consumer Goods	3,961.01	3,957.25	-0.09	-0.46%
Oil and Gas	5,852.29	5,859.28	0.12	119.43%
Industrial Goods	11,707.38	11,668.33	-0.33	105.56%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CHAMPION	8.00	8.80	0.80	10.00%
WAPIC	2.00	2.20	0.20	10.00%
HONYFLOUR	26.85	29.50	2.65	9.87%
SOVRENINS	1.78	1.95	0.17	9.55%
MANSARD	10.80	11.80	1.00	9.26%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
PZ	71.95	64.80	-7.15	-9.94%
ABCTRANS	6.20	5.70	-0.50	-8.06%
AFRIPRUD	10.70	10.05	-0.65	-6.07%
TANTALIZER	3.80	3.60	-0.20	-5.26%
UPL	4.85	4.60	-0.25	-5.15%

NASD OTC Snapshot

Statistics	05-Nov-26	06-Nov-26	Change %	YTD (%)
NSI	4,273.18	4,251.70	-0.50	19.98
Market Capitalization (₦'Bn)	2,564.83	2,551.93	-0.50	20.36
Value Traded (₦'000)	10,584.04	3,269,030.20	30786.41	
Volume Traded	1,146,026	1,223,964,597	106700.77	
Deals	22	35	59.09	

Equities

Stock market closes week on a negative note

The stock market closed the week on a bearish note, as the NGX All-Share Index (ASI) declined by 0.33% to settle at 248,877.22 points. Consequently, market capitalisation decreased by ₦541.10 billion, while the year-to-date (YTD) return eased to 59.93%.

Having recorded losses in three out of five trading sessions this week, the benchmark index closed 2.13% lower w/w. Losses in PRESCO (-10.00% w/w), HBMNG (-10.00% w/w), ARADEL (-9.99% w/w), PZ (-9.94% w/w), FIRSTHOLDCO (-7.68% w/w), among others, outweighed gains in HONYFLOUR (+30.82% w/w), TRANSPOWER (+23.37% w/w) and OANDO (+5.08% w/w).

Trading activity weakened w/w, as both volume and value traded declined by 62.87% and 67.33%, respectively. A total of 2.83 billion shares, valued at ₦208.41 billion, were exchanged in 192,058 deals.

In today's trading session, GTCO (-1.80%) led both the volume and value chart, recording 41.02 million shares worth ₦4.92 billion.

Market breadth improved to 1.26x from 0.56x in the previous session, as 29 stocks advanced against 23 decliners.

OUTLOOK

Equity market sentiment is expected to remain selective in the comingv week as investors react to nine-month earnings

Fixed Income

Fixed income market summary	6-Nov-26	5-Nov-26	
T-bills	Current	Previous	Change(bp)
3m	17.52	17.52	0.01
6m	17.76	17.77	0.01
12m	18.75	18.22	0.53

FGN Bonds	Current	Previous	Change(bp)
3yrs	15.60	15.60	0.00
5yrs	16.80	16.80	0.00
7yrs	16.80	16.80	0.00
10yrs	16.84	16.85	0.01

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	6.15	6.10	0.05
5yrs	6.92	6.89	0.03
7yrs	6.99	6.95	0.04
25yrs	8.33	8.29	0.04

FX	Current	Previous	Change(N)
CBN - EFEMS	1,348.74	1,347.80	0.94

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield increased by 6bps to settle at 18.02%. The O/N rate rose by 2bp at 20.20%.

Fixed Income

At the secondary Bond market, average yield fell by 1bp to settle at 16.18%.

Currency

The Naira at the EFEMS depreciated by 0.07% to N1,348.74/USD.

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GLOBAL INDICES HIGHLIGHTS

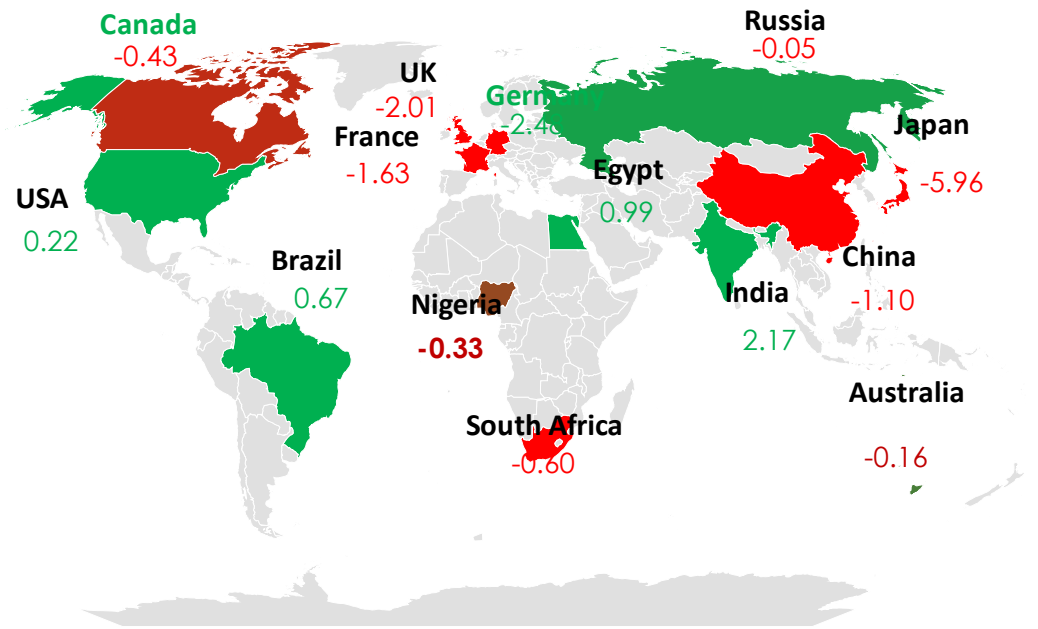
Statistics	05-Nov-26	06-Nov-26	Change %	YTD (%)
USA - S&P 500	7,353.73	7,370.06	0.22	7.66%
Canada - S&P/TSX 60	2,118.22	2,109.16	-0.43	13.40%
Uk - FSTE 100	10,782.66	10,566.06	-2.01	6.39%
France - CAC 40	8,205.37	8,071.77	-1.63	-0.95%
Germany - DAX	26,325.01	25,672.00	-2.48	4.82%
Russia - RTSI	946.84	946.37	-0.05	-15.06%
China - Shanghai	3,689.91	3,649.18	-1.10	-8.05%
Japan - Nikkei 225	61,077.90	57,434.77	-5.96	14.09%
India - SENSEX	79,310.01	81,028.02	2.17	-4.92%
Australia - S&P ASX 20	5,258.00	5,249.50	-0.16	9.48%
Brazil - BOVESPA	166,191.00	167,301.00	0.67	3.83%
South Africa - FTSE/JSE	113,286.18	112,603.56	-0.60	-2.79%
Egypt - EGX 30	50,650.18	51,152.73	0.99	22.29%

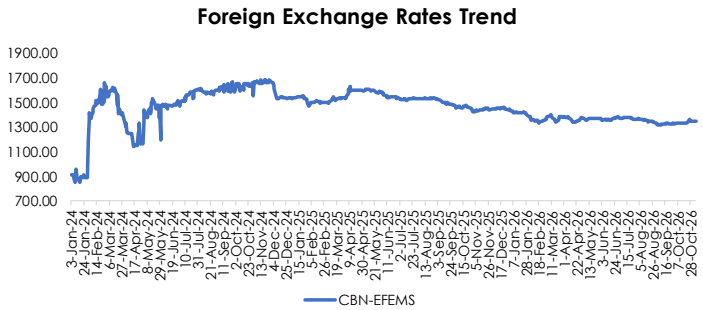
**Data for Nov-06-2026 is as of 05:02 PM (Nigerian Time)*

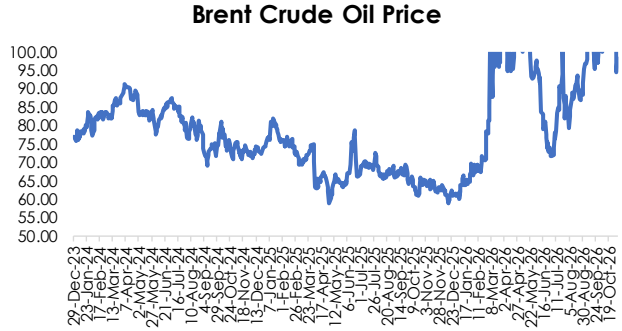
COMMODITY HIGHLIGHTS

Statistics	05-Nov-26	06-Nov-26	Change %	YTD (%)
Brent	98.29	98.43	0.14	61.76%
WIT	90.52	90.70	0.20	57.96%
Gold	4,113.50	4,049.55	-1.55	-7.06%
Silver	52.38	51.65	-1.38	-27.14%
Platinum	1,522.40	1,520.25	-0.14	-25.63%
Palladium	1,044.20	1,016.50	-2.65	-38.45%

Indices Overview







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