Daily Market Recap

Equity | Fixed Income | FX | Commodity

SCM CAPITAL

Friday, November 13, 2026

research@scmcapitalng.com

STOCK MARKET HIGHLIGHTS

NGX Statistics	12-Nov-26	13-Nov-26	Change %	YTD (%)
NGX All- Share Index	252,366.80	252,749.79	0.15	62.42
Market Capitalization (N'Trn)	163.86	164.11	0.15	65.14
Market Cap. ($'Bn)	120.63	121.03	0.33	
Total Value Traded (N'Bn)	78.60	23.09	-70.63	
Total Value Traded ($'Mn)	57.87	17.03	-70.58	
Total Volume Traded (Mn)	2,914.57	3,697.48	26.86	
Number of Deals	28,258	27,154	-3.91	
Market Breadth	1.05x			

Sectors	12-Nov-26	13-Nov-26	Change%	YTD (%)
Banks	2,356.81	2,364.86	0.34	56.01%
Insurance	1,057.59	1,072.30	1.39	-9.84%
Consumer Goods	3,931.84	3,935.59	0.10	-1.00%
Oil and Gas	5,991.03	5,991.03	0.00	124.36%
Industrial Goods	12,336.94	12,381.03	0.36	118.11%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CAVERTON	4.00	4.40	0.40	10.00%
FTGINSURE	1.51	1.66	0.15	9.93%
AUSTINLAZ	2.22	2.44	0.22	9.91%
LASACO	1.74	1.90	0.16	9.20%
VERITASKAP	1.00	1.09	0.09	9.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
MULTIVERSE	19.20	17.30	-1.90	-9.90%
LIVINGTRUST	2.58	2.33	-0.25	-9.69%
ETRANZACT	18.50	17.00	-1.50	-8.11%
HMCALL	3.49	3.33	-0.16	-4.58%
SOVRENINS	2.27	2.19	-0.08	-3.52%

NASD OTC Snapshot

Statistics	12-Nov-26	13-Nov-26	Change %	YTD (%)
NSI	4,363.07	4,384.37	0.49	23.72
Market Capitalization (₦'Bn)	2,618.78	2,631.56	0.49	24.11
Value Traded (₦'000)	73,918.92	20,989.35	-71.60	
Volume Traded	14,398,679	397,370	-97.24	
Deals	48	36	-25.00	

Equities

Domestic Bourse Closes the Week in Positive Territory

The domestic bourse closed the week on a positive note, as the NGX All-Share Index (ASI) advanced by 0.15% to settle at 252,749.79 points. Consequently, market capitalisation increased by ₦248.66 billion, while the year-to-date (YTD) return improved to 62.42%.

Having gained in three out of five trading sessions this week, the broad index closed 1.56% higher w/w. Gains recorded in CHAMPION (+22.27% w/w), OANDO (+14.80% w/w), FIDSON (+9.94% w/w), DANGCEM (+9.61% w/w), HONYFLOUR (+13.73% w/w), amongst others were ableto offset losses in NAHCO (-9.99% w/w), INTBREW (-7.18% w/w) and ZENITHBANK (-1.28% w/w).

Trading activity was mixed w/w, as volume traded increased by 183.83% to 8.03 billion shares, while the value traded declined by 11.06% to ₦185.26 billion.

In today's trading session, LINKASSURE (+3.31%) led the volume chart, with 3.10 billion shares traded, while FIRSTHOLDCO (+1.76%) topped the value chart, recording 72.24 million shares valued at ₦7.33 billion.

Market breadth settled at 1.05x, with 22 stocks advancing against 21 decliners.

OUTLOOK

Equity market sentiment is expected to remain selective in the

Fixed Income

Fixed income market summary	13-Nov-26	12-Nov-26	
T-bills	Current	Previous	Change(bp)
3m	17.46	17.46	0.01
6m	17.70	17.71	0.01
12m	18.68	18.69	0.01

FGN Bonds	Current	Previous	Change(bp)
3yrs	15.60	15.60	0.00
5yrs	16.73	16.55	0.18
7yrs	16.62	16.76	0.14
10yrs	16.60	16.60	0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	6.24	6.09	0.15
5yrs	6.95	6.85	0.10
7yrs	7.12	6.98	0.14
25yrs	8.44	8.32	0.12

FX	Current	Previous	Change(N)
CBN - EFEMS	1,355.88	1,358.34	2.46

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield closed flat at 17.96%. The O/N rate rose by 11bps to settle at 20.43%.

Fixed Income

At the secondary Bond market, average yield fell by 1bp to settle at 16.07%.

Currency

The Naira at the EFEMS appreciated by 0.88% to N1,355.88/USD.

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GLOBAL INDICES HIGHLIGHTS

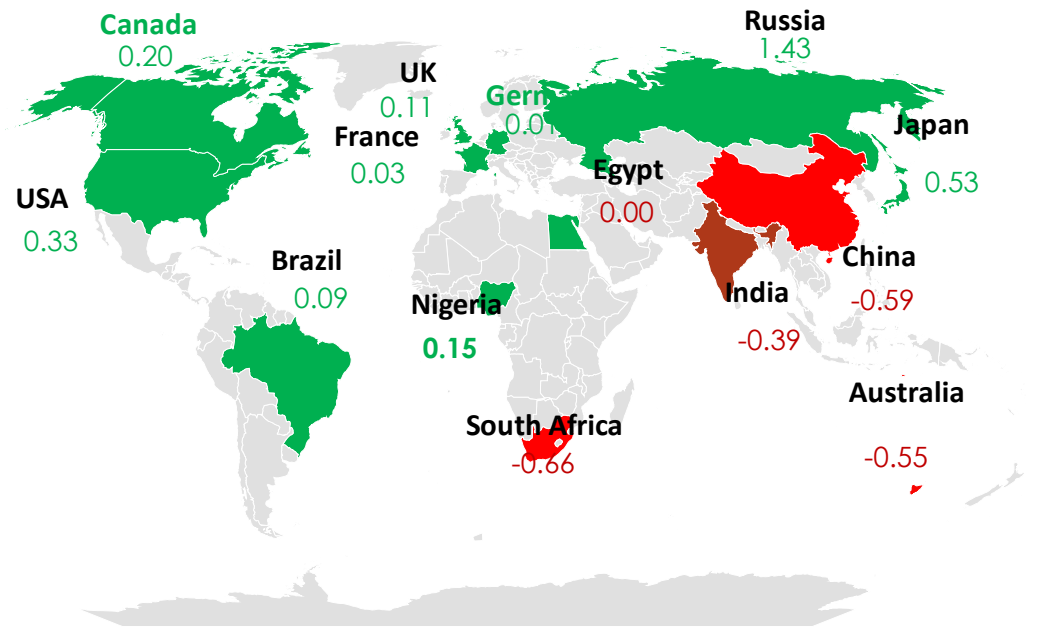
Statistics	12-Nov-26	13-Nov-26	Change %	YTD (%)
USA - S&P 500	7,592.40	7,617.51	0.33	11.28%
Canada - S&P/TSX 60	2,154.60	2,158.86	0.20	16.07%
Uk - FSTE 100	10,863.09	10,874.56	0.11	9.50%
France - CAC 40	8,361.36	8,364.05	0.03	2.63%
Germany - DAX	26,771.88	26,774.27	0.01	9.33%
Russia - RTSI	951.35	964.92	1.43	-13.39%
China - Shanghai	3,655.83	3,634.35	-0.59	-8.43%
Japan - Nikkei 225	60,819.36	61,142.35	0.53	21.46%
India - SENSEX	81,911.01	81,592.45	-0.39	-4.26%
Australia - S&P ASX 20	5,306.70	5,277.30	-0.55	10.06%
Brazil - BOVESPA	171,324.00	171,476.00	0.09	6.42%
South Africa - FTSE/JSE	112,894.87	112,149.29	-0.66	-3.18%
Egypt - EGX 30	52,023.37	52,023.37	0.00	24.37%

**Data for Nov-13-2026 is as of 04:52 PM (Nigerian Time)*

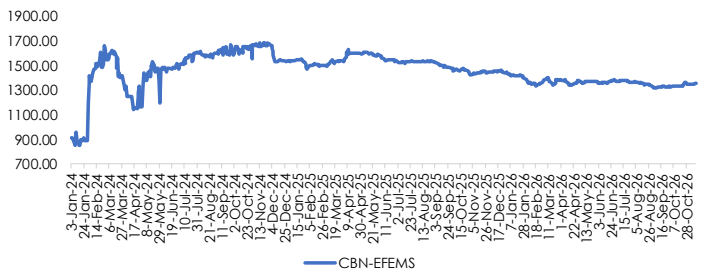
COMMODITY HIGHLIGHTS

Statistics	12-Nov-26	13-Nov-26	Change %	YTD (%)
Brent	95.82	96.76	0.98	59.01%
WIT	88.74	89.29	0.62	55.50%
Gold	3,885.30	3,899.50	0.37	-10.50%
Silver	50.07	49.77	-0.59	-29.80%
Platinum	1,520.40	1,502.35	-1.19	-26.51%
Palladium	991.50	1,009.25	1.79	-38.89%

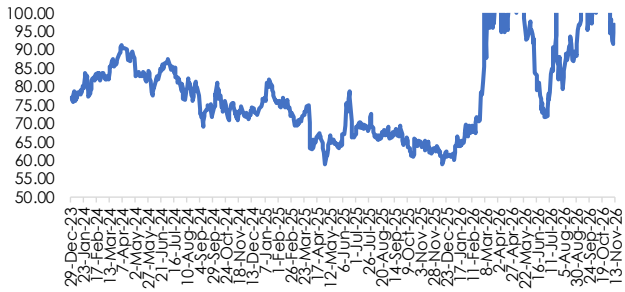
Indices Overview



Foreign Exchange Rates Trend



Brent Crude Oil Price



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Investment Banking | Advisory Services
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Contact
+234- 01 280 2226-8
info@scmcapitalng.com