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# DAILY MARKET REPORT

Nigerian Market Highlight: Equity, Fixed Income & Money Market Review

## THURSDAY, 21ST AUGUST 2025

## **Equities Market**

- At the close of trading on the Nigerian Stock Exchange (NGX) today, 573.68 million shares worth ¥12.86 billion were exchanged in 25,855 deals reflecting a 21% drop in volume and a 10% decline in deal count compared to the previous session. Market capitalization settled at ¥88.8 trillion.
- Out of 129 traded equities, 17 advanced while 45 declined. Skye Shelter Fund led the gainers with a 9.99% rise to №274.15, followed by Jaiz Bank (+9.75%), Secure Electronic Technology (+9.38%), and Omatek Ventures (+5.88%). On the flip side, University Press, Thomas Wyatt Nigeria, International Energy Insurance, and Veritas Kapital Assurance all shed 10% each, closing at №6.30, №1.62, №1.62, and №0.45 respectively.
- Fidelity Bank topped the activity chart with 96.1 million units traded, trailed by Veritas Kapital Assurance (36.6m), Universal Insurance (32.9m), and Access Holdings (30.3m).

## Fixed Income and Money Market

#### Money Market

• System liquidity opened at 390.89bn ahead of the OMO auction. The OBB and OVN rates closed unchanged at 26.50% and 27.00%, respectively.

#### Treasury Bills Market

• The Treasury bills secondary market had limited activity with attention skewed to the longer tenor OMO bill particularly the 7-Apr.

#### **Bonds Market**

• The FGN bonds secondary market was bearish as participants expect higher yields at the next bond auction scheduled for Monday.

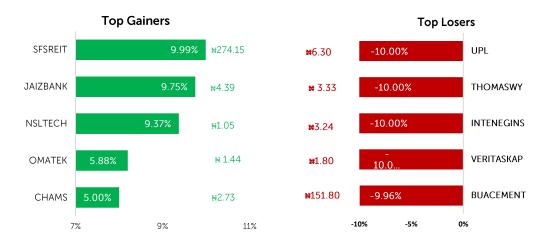
FGN BONDS	Yield (%)	Change	Price (¥)
19.94 20-MAR-2027	16.61	-0.01	104.41
14.55 26-APR-2029	16.85	0.00	93.81
18.50 21-FEB-2031	17.87	0.16	102.15
19.00 21-FEB-2034	17.19	-0.07	107.93
16.2499 18-APR-2037	16.09	0.00	100.76
15.45 21-JUN-2038	15.87	0.00	97.67
14.80 26-APR-2049	15.81	0.00	93.73
12.98 27-MAR-2050	15.84	0.00	82.35
15.70 21-JUN-2053	16.07	0.00	97.65

GLOBAL MARKET	21/08/2025	D-o-D	W-o-W	М-о-М	YTD
S&P 500	6,370.17	-0.40%	-1.23%	0.96%	8.31%
Nasdaq	21,100.31	-0.34%	-2.42%	0.99%	9.30%
FTSE	9,286.95	-0.25%	1.62%	2.93%	13.63%
CAC	7,936.30	-0.02%	0.85%	2.50%	7.54%
DAX	24,238.60	-0.21%	-0.52%	-0.30%	21.75%

### **Alternatives**

- Brent prices increased by 0.39% to \$67.80 per barrel at the time of writing.
- WTI crude prices increased by 0.37% to \$63.77 per barrel at the time of writing.
- Gold prices decreased by -0.29% to \$3,330.00 per ounce at the time of writing.

#### MARKET OVERVIEW 21/08/2025 20/08/2025 Change NGXASI 140,332.44 141,566.3 -0.87% Value Traded ¥12.88 billion ¥12.94 billion -0.46% Volume Traded 573.75 million 721.82 million -20.51% Market Capitalization -0.87% ¥88.783 trillion ₦89.565 trillion **SECTOR INDICES** 21/08/2025 W-o-W MTD D-o-D NGX30 5121.03 -0.85% -3.38% -1.24% **NGXBNK** 1534.60 0.47% -3.73% -5.21% **NGXOILANDGAS** 2384.21 -0.06% -0.96% -2.15% **NGXINS** 1211.26 -4.69% -18.31% 36.56% **NGXIND** 4996.39 -4.04% -8.24% -1.17% **NGXPENSION** 6666.43 -0.23% -2.88% -3.59% **NGXLOTUS** 11559.96 -0.56% -3.41% -0.57%



MONEY MARKET	21/08/2025	20/08/2025
Open Repo (%)	26.50%	26.50%
Overnight (%)	27.00%	27.00%
TREASURY BILLS YIELD	21/08/2025	20/08/2025
77-Days	16.66%	16.66%
168-Days	18.56%	18.57%
350-Days	19.18%	19.19%
EXCHANGE RATE	21/08/2025	20/08/2025
FX Close (₦/\$)	1535.78	1536.73

FGN EUROBONDS	Yield (%)	Price (¥)	Change
7.625 21-NOV-2025	6.28	100.30	0.04
6.50 NOV-28-2027	6.50	99.99	0.10
8.375 MAR-24-2029	7.27	103.43	0.11
8.747 JAN-21-2031	7.98	103.32	0.07
7.875 16-FEB-2032	8.25	98.12	0.06
7.625 NOV-28-2047	9.57	82.22	0.07
9.248 JAN-21-2049	9.60	96.69	0.03



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