

TUESDAY, 07<sup>TH</sup> OCTOBER 2025

### Equities Market

- The NGX closed today's session with 507.40 million shares exchanged in 30,665 deals, worth ₦24.28 billion, showing a 2% decline in volume, 67% improvement in turnover, and 14% drop in deals compared to Monday, October 6. The market capitalization stood at ₦92 trillion.
- A total of 127 listed equities traded, ending with 38 gainers, 35 losers, and 54 unchanged. Cornerstone Insurance (+9.92%), Consolidated Hallmark Holdings (+9.52%), Chams (+9.22%), and VFD Group (+9.17%) led the advancers, driven by renewed investor demand. Conversely, LivingTrust Mortgage Bank (-10.00%), Austin Laz & Co (-9.74%), Juli (-9.60%), and Livestock Feeds (-7.50%) topped the laggards as profit-taking weighed on prices.
- Access Holdings recorded the day's highest trading volume with 45.9 million shares, followed by Ellah Lakes (39.5m), Chams (30.8m), and Sovereign Trust Insurance (27.8m). Activity was dominated by trades in the banking, insurance, and industrial goods sectors, reflecting continued rotation into liquid counters amid macroeconomic uncertainties.

### Fixed Income and Money Market

#### Money Market

- System liquidity stood at ₦6.38tn long. The OBB and OVN rates stood at 24.50% and 24.87%, respectively.

#### Treasury Bills Market

- The treasury bills secondary market traded quietly with a mild bullish tone ahead of today's auction, with the average rate closing at 16.41%.

#### Bonds Market

- The FGN bonds secondary market traded calmly with mixed sentiment, with some demand across select instruments pushed the average yield down by 21bps to 16.06%.

FGN BONDS	Yield (%)	Change	Price (₦)
19.94 20-MAR-2027	16.04	-0.68	104.00
14.55 26-APR-2029	16.12	-0.25	95.20
18.50 21-FEB-2031	16.13	-0.01	108.23
19.00 21-FEB-2034	16.69	0.00	111.89
16.2499 18-APR-2037	15.76	-0.23	101.34
15.45 21-JUN-2038	15.86	0.00	97.72
14.80 26-APR-2049	15.58	-0.26	93.60
12.98 27-MAR-2050	15.56	-0.19	82.50
15.70 21-JUN-2053	15.52	-0.23	99.64

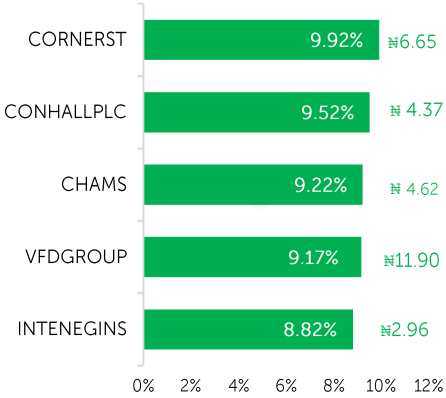
GLOBAL MARKET	07/10/2025	D-o-D	W-o-W	M-o-M	YTD
S&P 500	6,721.91	-0.29%	0.44%	3.67%	14.19%
Nasdaq	22,794.96	-0.67%	0.56%	5.02%	18.02%
FTSE	9,481.05	-0.02%	1.95%	2.82%	14.73%
CAC	7,960.00	-0.15%	1.00%	2.91%	7.66%
DAX	24,389.20	0.04%	2.71%	2.44%	21.80%

### Alternatives

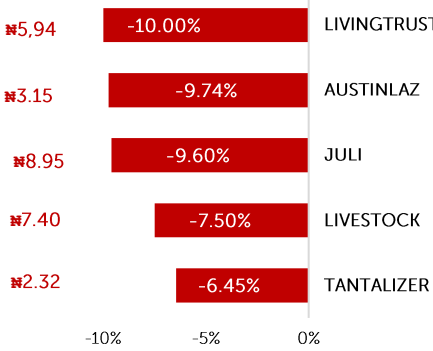
- Brent prices decreased by 0.60% to \$65.09 per barrel at the time of writing.
- WTI crude prices decreased by 0.41% to \$61.42 per barrel at the time of writing.
- Gold prices increased by 0.45% to \$3,980.47 per ounce at the time of writing.

MARKET OVERVIEW		07/10/2025	06/10/2025	Change
NGXASI		144,995.26	144,822.78	0.12%
Value Traded		₦24.29 billion	₦15.39 billion	57.74%
Volume Traded		507.41 million	195.89 million	159.02%
Market Capitalization		₦92.031 trillion	₦91.29 trillion	0.12%
SECTOR INDICES	07/10/2025	D-o-D	W-o-W	MTD
NGX30	5285.94	0.14%	1.43%	1.30%
NGXBNK	1515.91	-1.33%	0.12%	-0.06%
NGXOILANDGAS	2648.41	-0.87%	4.97%	4.85%
NGXINS	11275.43	1.98%	7.09%	6.63%
NGXIND	5113.28	0.69%	0.88%	0.90%
NGXPENSION	6817.09	-0.40%	1.38%	1.18%

#### Top Gainers



#### Top Losers



MONEY MARKET	07/10/2025	06/10/2025
Open Repo (%)	24.50%	24.50%
Overnight (%)	24.87%	24.88%
TREASURY BILLS YIELD	07/10/2025	06/10/2025
53-Days	17.65%	17.69%
149-Days	17.68%	17.90%
331-Days	18.08%	18.49%
EXCHANGE RATE	07/10/2025	06/10/2025
FX Close (₦/\$)	1,471.09	1,470.26

FGN EUROBONDS	Yield (%)	Price (₦)	Change
7.625 21-NOV-2025	7.20	100.03	-0.02
6.50 NOV-28-2027	6.38	100.22	0.06
8.375 MAR-24-2029	7.57	102.40	0.36
8.747 JAN-21-2031	7.96	103.34	0.15
7.875 16-FEB-2032	7.09	98.91	0.14
7.625 NOV-28-2047	9.10	86.07	0.11
9.248 JAN-21-2049	9.14	101.03	0.07



GROW YOUR WEALTH BY INVESTING WITH US TODAY



#### Disclaimer:

This report's content is solely for informational purposes and should not be considered investment or financial advice, nor as a recommendation of any investment product. It does not take into account the specific circumstances, investment goals, or financial situations of any individual or entity. CFG Africa Limited, its affiliates, successors, employees, and third-party service providers are not liable for any consequences arising from reliance on the information or content presented in this report.