(Trading License Holder of Nigerian Exchange Limited)
(Dealing Member of Lagos Commodities & Futures Exchange)
(Participating Institution of NASD OTC Securities Limited)

RC:172151

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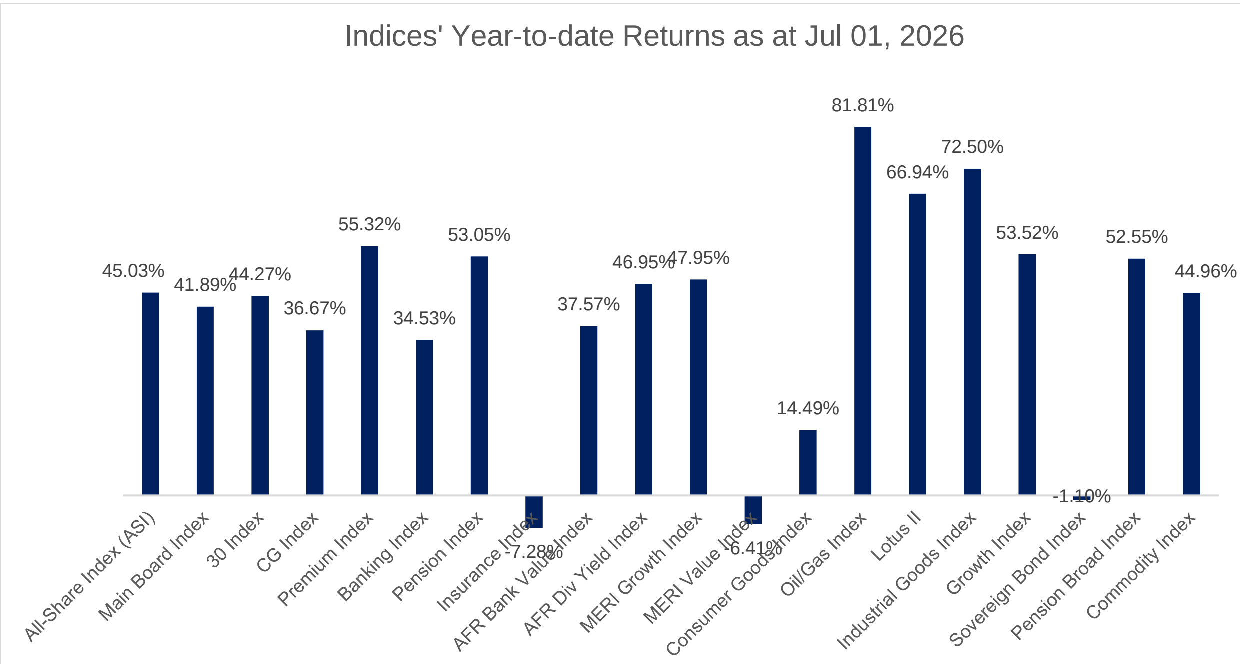
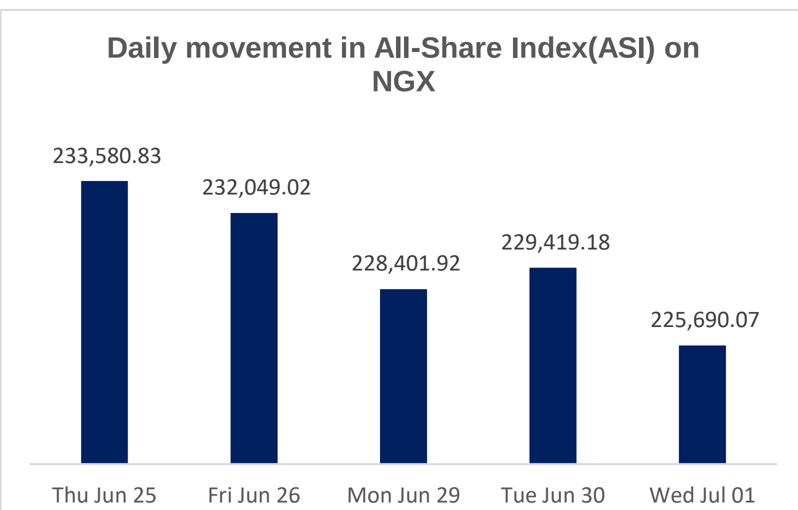
Daily Market Report | 1 July 2026

ASI begins the Second Half of 2026 with a 1.63% Loss

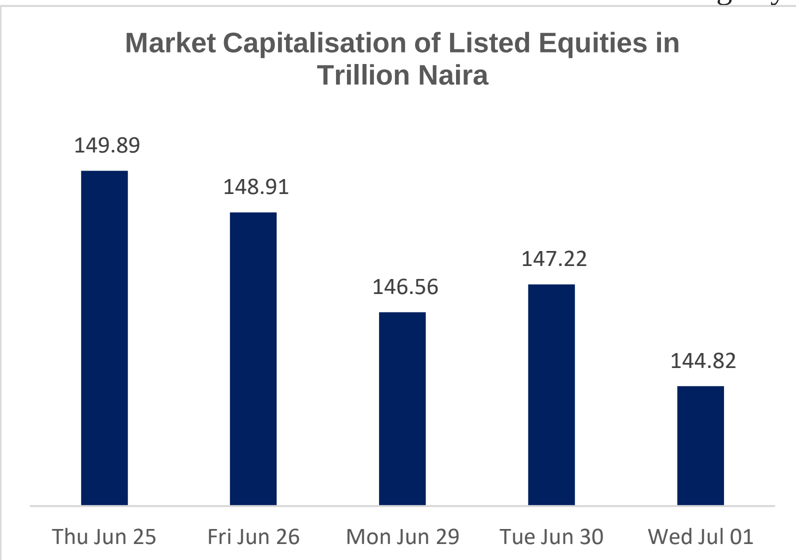


The All-Share Index (ASI) of the Nigerian Exchange Limited started the second half of 2026 with a loss as it shed 3,729.11 points to close at 225,690.07 points on July 1 as against 229,419.18 points on June 30. This amounted to a daily loss of 1.63% while the year-to-date return declined further to 45.03%,



Consequently, the market capitalisation shed N2.39trn to close at N144.82trn after today's trading session compared with N147.22trn as of June 30. Blue chip companies that contributed to the decline in equity value include Aradel Holdings (-10.00%); NASCON (-9.98%); Dangote Cement (-7.48%); Transcorp (-6.99%); Zenith Bank (-4.50%), and FCMB Group (-4.35%).

Investors traded 488.11 million shares on the first trading day in the second half of 2026 valued at N13.96bn in 46,929 deals. A total of 155 stocks were traded on Wednesday out of which 29 stocks advanced; 42 stocks declined, while the prices of 84 stocks remained unchanged.



Sterling Financial Holdings led the activity chart by volume, recording 124.61 million shares in today's trading session. It was followed by UPDC, 40.09 million shares; Access Holdings, 36.84 million shares; Honeywell Flour, 33.77 million shares, and United Capital, 28.35 million shares.

On the value side, we have Zenith Bank, N2.13bn; Aradel Holdings, N2.07bn; MTN Nigeria, N1.61bn; Sterling Financial Holdings, N980.63m, and Dangote Cement, N876.01m as stocks with the most transactions by value on Wednesday.

On-Going Rights Issue

Regency Alliance Insurance Plc is currently offering existing shareholders 3,201,000,000 ordinary shares of 50 Kobo each at ₦0.95 per share, on the basis of One (1) new ordinary share for every Five (5) ordinary shares held as at the close of business on 8th May 2026.

The purpose of the Rights Issue is to strengthen the company's capital base in compliance with the Nigerian Insurance Industry Reform Act (NIIRA) 2025, which mandates non-life insurance companies to maintain a minimum capital base of ₦15 billion. The offer opened on June 24, 2026 and will close on July 7, 2026.

Other Market Developments

Agusto & Co. has upgraded the MTN Nigeria's long-term rating to Aaa (the highest on its national scale) from Aa+, while reaffirming its short-term rating at A1+. The rating outlook is stable. This follows the recent affirmation of the company's AAA (NG) long term and A1+ (NG) short-term ratings by Global Credit Rating Company (GCR), placing MTN Nigeria at the highest rating level across both Agusto and GCR.

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Daily Gainers | 1 July, 2026

Stock	Opening Price	Closing Price	Change
SIAML PENSION ETF	2,608.10	2,868.91	10.00%
AUSTIN LAZ	3.00	3.30	10.00%
GUINEA INSURANCE	0.91	1.00	9.89%
ABBEY BANK	7.25	7.95	9.66%
DAAR COMMS	1.25	1.37	9.60%
REGENCY ASSURANCE	0.84	0.92	9.52%
VETIVA BANKING ETF	24.21	26.50	9.46%
VETIVA INDUSTRIAL ETF	109.00	118.45	8.67%
SOVEREIGN TRUST INSURANCE	1.91	2.06	7.85%
LIVINGTRUST MORTGAGE BANK	3.58	3.80	6.15%

Daily Losers | 1 July 2026

Stock	Opening Price	Closing Price	Change
FGNSB APR 2029	100.00	69.99	-30.01%
FGS MAR 2029	100.00	70.00	-30.00%
FGS FEB 2027	107.74	85.00	-21.11%
FGS SEP 2027	100.00	80.00	-20.00%
FGN OCT 2033	122.99	100.99	-17.89%
FGS FEB 2029	90.25	80.00	-11.36%
NEIMETH	9.00	8.10	-10.00%
MCNICHOLS PLC	8.50	7.65	-10.00%
ARADEL HOLDINGS	1,417.50	1,275.80	-10.00%
NASCON	219.50	197.60	-9.98%

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The Brook Securities Ltd is registered and regulated by the Securities and Exchange Commission (SEC) Nigeria

NASD OTC Exchange Price List 1 July, 2026

Security	Open Price	High	Low	Price Close	Change(%)	Trades	Volume	Value(N)
CSCS	88.00	89.00	79.20	87.22	-0.89	6	200,182	17,461,429.40
FRIESLAND CAMPINA WAMCO	152.01	149.00	136.81	152.01	0.00	4	9,960	1,362,749.50
FOOD CONCEPTS	2.50	2.50	2.50	2.50	0.00	3	8,871	22,177.50
GEO-FLUIDS	2.37	2.55	2.55	2.37	0.00	1	10	25.5
NIPCO	384.00	422.40	422.40	384.00	0.00	2	15	6,336.00
OKITIPUPA OIL PALM	298.00	268.20	268.20	268.20	-10.00	1	10,000	2,682,000.00
PURPLE REAL ESTATE	8.00	8.00	8.00	8.00	0.00	1	200	1,600.00