The Brook Securities Limited
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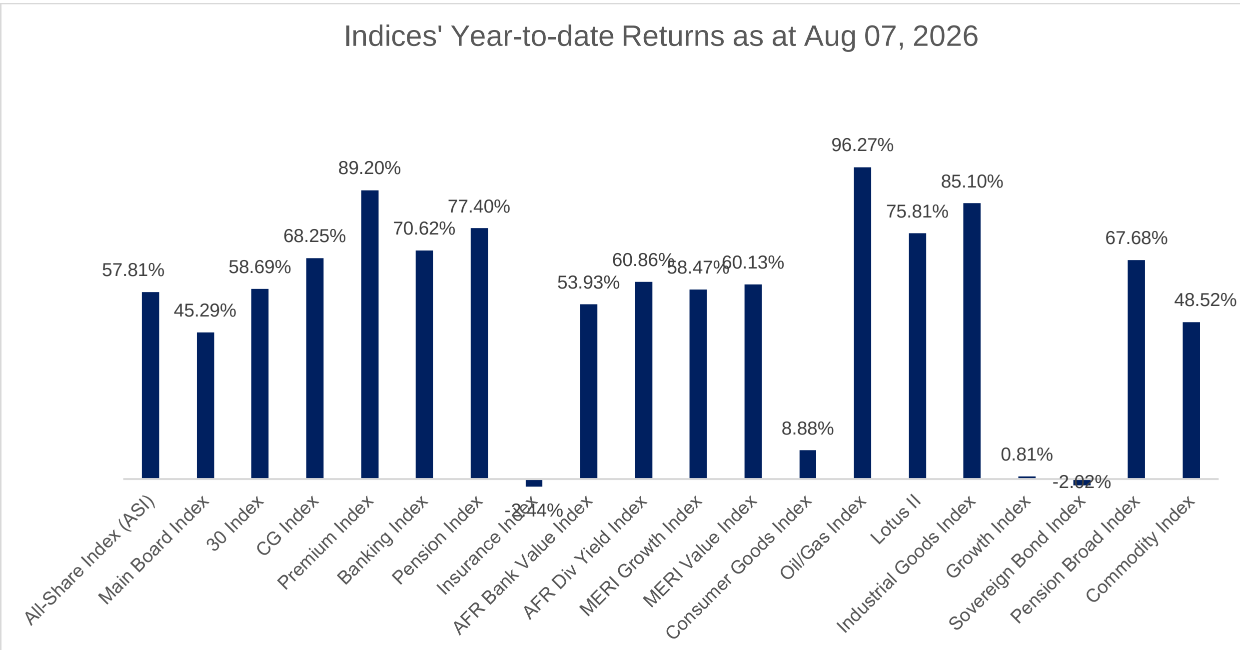
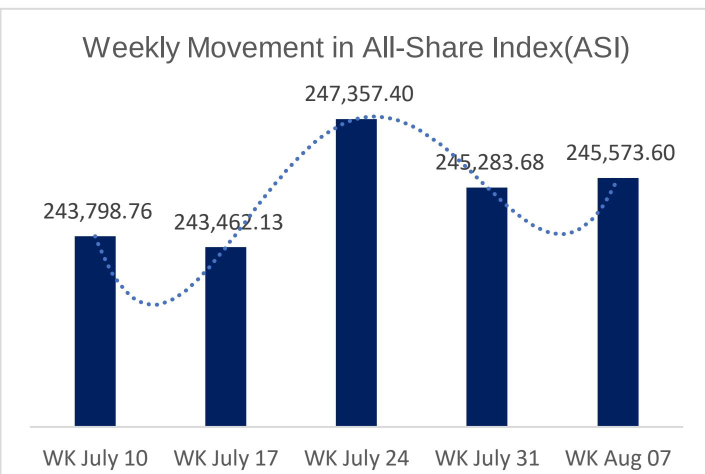
Weekly Market Report | 07 Aug. 2026

Mixed Performance as All-Share Index rises by 0.12%

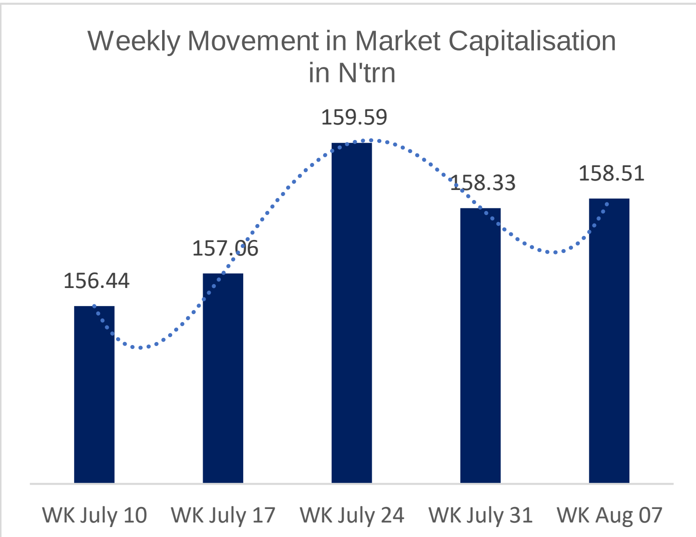


The Nigerian equity market recorded a mixed performance during the week ended August 7, 2026, as trading oscillated between bullish and bearish sessions, reflecting changing investor perceptions of opportunities across the market.



Notwithstanding the mixed sentiment, the All-Share Index (ASI) gained 289.92 points to close the week at 245,573.60 points on Friday, August 7, 2026, compared with 245,283.68 points recorded on July 31, 2026. This represents a week-to-date gain of 0.12%, while the year-to-date return remained robust at 57.81%.

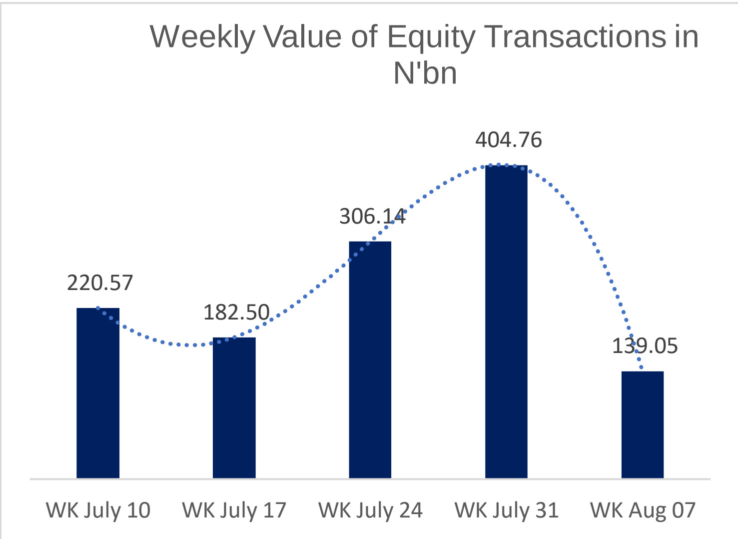
Similarly, market capitalisation rose to N158.51 trillion on Friday, August 7, from N158.33 trillion at the end of the previous week. This represents a weekly increase of N187.13 billion in the total value of listed equities.



Market breadth weakened during the week. A total of 26 equities appreciated in price, compared with 33 equities in the previous week, while 63 equities depreciated, up from 56 equities recorded in the preceding week. Meanwhile, the prices of 58 equities remained unchanged, the same number recorded in the previous week.

The first week of August recorded a turnover of 5.36 billion shares valued at N139.05 billion in 261,869 deals. This compares with 5.12 billion shares worth N404.76 billion traded in 285,223 deals during the previous week.

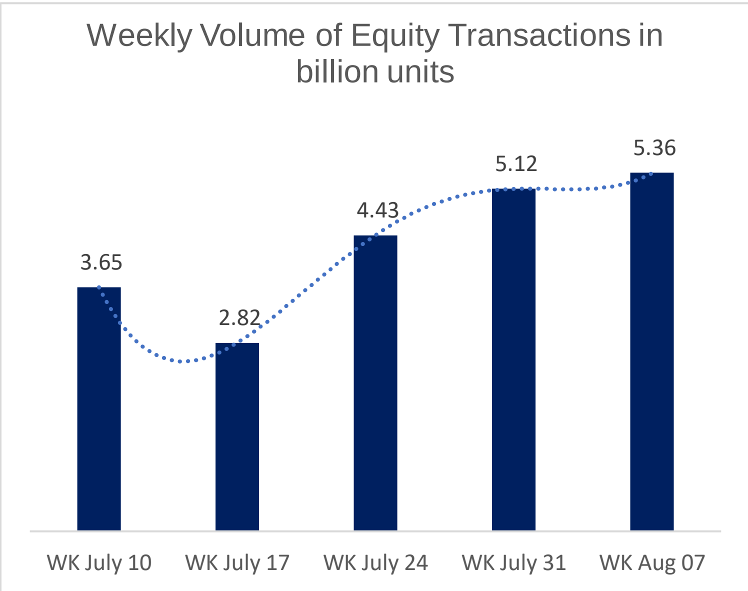
The financial services industry remained the most active segment of the market, accounting for 3.47 billion shares valued at N73.01 billion in 117,509 deals. The sector contributed 64.73% of total market volume and 52.51% of market value during the week.



The oil and gas industry ranked second, with 1.02 billion shares valued at N18.90 billion traded in 17,680 deals. The ICT industry occupied the third position on the activity chart, recording 232.37 million shares worth N14.62 billion in 31,888 deals.

At the individual stock level, Japaul Gold, Fortis Global Insurance and FCMB Group emerged as the most traded equities by volume. Collectively, the three stocks accounted for 2.56 billion shares valued at N14.17 billion in 6,645 deals, representing 47.80% of total market volume and 10.19% of total market value.

Exchange-Traded Products (ETPs)



Activity in the Exchange-Traded Products market moderated during the week. A total of 3.56 million ETF units worth N513.09 million changed hands in 5,558 deals, compared with 4.61 million units valued at N549.38 million traded in 6,535 deals in the previous week. As was the case in the preceding week, VETBANK, VETGRIF30 and VETGOODS were the most actively traded ETFs.

Bonds

Trading activity in the bond segment also declined during the week. Investors exchanged 117,372 units of bonds valued at N121.25 million in 29 deals, compared with 305,669 units worth N311.56 million traded in 53 deals in the previous week. The most actively traded bonds during the week were FGSUK2032S7 and TAJSUKS2.

Price Adjustments

The NGX during the week adjusted the share prices of the following stocks for the different corporate actions announced by their respective boards of directors:

- ✓ The share price of Unilever was adjusted for a dividend of N2.00. Ex-div price: N145.95
- ✓ The share price of VFD Group was adjusted for a dividend of N0.24. Ex-div price: N11.36

Outlook

The final day for investors seeking to qualify for HBM Nigeria's interim dividend on a cum-dividend basis is Monday, August 10, 2026. Consequently, renewed buying interest in HBM Nigeria could emerge on Monday as investors position themselves ahead of the qualification deadline.

Meanwhile, the special block sale involving shares of First Holdco is expected to keep the stock in focus in the coming week and could influence broader market sentiment.

We also anticipate some profit-taking activities in equities that have recorded significant year-to-date rallies, particularly as investors reassess valuations and lock in gains. Overall, market activity is likely to remain mixed, with corporate actions, dividend expectations and profit-taking continuing to shape investor sentiment.

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Weekly Gainers 07 Aug, 2026				**Weekly Losers 07 Aug, 2026**			
Stock	Opening Price	Closing Price	Change	Stock	Opening Price	Closing Price	Change
AVA Capital	8.25	11.00	33.33%	Thomas Wyatt	4.38	3.21	-26.71%
FCMB Group	11.45	12.95	13.10%	Trans-Nationwide	2.82	2.15	-23.76%
First Holdco	129.45	145.40	12.23%	Critical Minerals Financing Corp	3.88	3.00	-22.68%
Fortis Global Insurance	2.34	2.60	11.11%	Ecobank	88.95	72.10	-18.94%
Linkage Assurance	1.60	1.77	10.63%	Consolidated Hallmark	8.36	6.98	-16.51%
Caverton Offshore	5.00	5.50	10.00%	Sovereign Trust Ins.	2.00	1.67	-16.50%
Eterna	33.00	36.30	10.00%	Multiverse Mining	25.50	21.30	-16.47%
NREIT	103.00	113.00	9.71%	Zichis Agro-Allied	24.55	21.55	-12.22%
Vitafoam	179.80	194.00	7.90%	Legend Internet	4.75	4.20	-11.58%
Cornerstone	5.40	5.65	4.63%	Sunu Assurances	3.70	3.28	-11.35%

Company	Dividend (N)	Bonus	Dividend Type	Qualification Date	Payment Date
E-Tranzact	0.13	Nil	Interim	July 06, 2026	
Aradel	23	Nil	Final	July 10, 2026	
Africa Prudential	0.1	Nil	Interim	July 20, 2026	July 23,2026
Transcorp Power	1.5	Nil	Interim	July 20, 2026	July 23,2026
Transcorp Hotels	0.1	Nil	Interim	July 22, 2026	July 27, 2026
Transcorp	0.4	Nil	Interim	July 23, 2026	July 28, 2026
NGX	1.3	Nil	Interim	July 29. 2026	Aug. 5. 2026
Guinness Nigeria	7	Nil	Interim	July 29. 2026	Aug. 10, 2026
Unilever	2	Nil	Interim	July 31, 2026	Aug. 14, 2026
VFD Group	0.24	Nil	Interim	Aug. 3, 2026	Aug. 10, 2026
Presco	16.66	Nil	Final	Aug. 7, 2026	
The Initiates	0.2	Nil	Interim	Aug. 10, 2026	Aug. 31, 2026
HBM Nigeria	16	Nil	Interim	Aug. 12, 2026	Aug. 17, 2026
Presco	10	Nil	Interim	Aug.14, 2026	Aug. 27, 2026
MTN Nigeria	26	Nil	Interim	Aug. 20, 2026	Sept. 7, 2026
University Press	0.18	Nil	Final	Aug. 28, 2026	Sept. 24, 2026
Red Star Express	0.45	Nil	Final	Sept. 1. 2026	Sept. 18. 2026
Academy Press	0.1	Nil	Final	Sept. 16, 2026	Sept. 25, 2026