



## Daily Market Recap

Friday, 13 June 2025

## STOCK MARKET HIGHLIGHTS

NGX Statistics	11-Jun-25	13-Jun-25	Change %	YTD (%)
NGX All- Share Index	114,659.11	115,429.54	0.67	12.15
Market Capitalization (N'Tm)	72.30	72.79	0.67	15.97
Market Cap. (\$'Bn)	46.95	47.27	0.69	
Total Value Traded (N'Bn)	14.19	17.95	26.53	
Total Value Traded (\$'Mn)	9.21	11.66	26.56	
Total Volume Traded (Mn)	471.15	933.23	98.07	
Number of Deals	20,538	20,500	-0.19	
Market Breadth	2.08x			

Sectors	11-Jun-25	13-Jun-25	Change%	YTD (%)
Banks	1,215.70	1,218.17	0.20	12.32%
Insurance	700.92	706.99	0.87	-1.53%
Consumer Goods	2,463.16	2,467.67	0.18	42.50%
Oil and Gas	2,353.44	2,375.32	0.93	-12.42%
Industrial Goods	3,445.00	3,528.06	2.41	-1.23%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
INFINITY	7.00	7.70	0.70	10.00%
MAYBAKER	14.00	15.40	1.40	10.00%
LIVINGTRUST	5.20	5.72	0.52	10.00%
STANBIC	72.15	79.35	7.20	9.98%
MRS	141.80	155.90	14.10	9.94%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
NNFM	125.05	112.55	-12.50	-10.00%
CONOIL	268.30	241.50	-26.80	-9.99%
ENAMELWA	20.55	18.50	-2.05	-9.98%
UPL	6.10	5.50	-0.60	-9.84%
JOHNHOLT	6.85	6.20	-0.65	-9.49%

Source: NGX, SCM Capital Research

## NASDAQ OTC Snapshot

Statistics	11-Jun-25	13-Jun-25	Change %	YTD (%)
NSI	3,337.48	3,341.22	0.11	11.27
Market Capitalization (N'Bn)	1,954.26	1,956.45	0.11	90.05
Value Traded (N'000)	13,015.92	9,125.20	-29.89	
Volume Traded	3,397,593	230,253	-93.22	
Deals	45	37	-17.78	

Source: NASD, SCM Capital Research

## Equities

## Stock market close positive:

The stock market closed the week on a positive note as the NGX-ASI 0.67% to close at 115,429.54 points, bringing the YTD return to 12.15%.

Having gained in two out of three trading sessions for the week, the broad closed 0.71% higher w/w. During the week, gains recorded in BERGER (-w/w), OANDO (+21.37% w/w), CADBURY (+10.81% w/w), MRS (+9.94% w/w), PRESCO (+4.79% w/w), were able to offset losses in NESTLE (-5.69% ACCESSCORP (-3.66% w/w), and ZENITHBANK (-1.08% w/w).

Market activity weakened week-on-week as volume and value moderated by 36.0% and 33.2% respectively. A total of 2.05bn units of valued at N51.02bn were exchanged in 65,016 deals over the three sessions for the week. For today, TANTALIZER led the volume charts with 4 units of shares, while GTCO led the value chart with 35.44m units of shares in deals worth N2.52bn. The market breadth (advance/decline ratio) in from 1.11x to 2.08x, reflective of 50 gainers against 24 decliners.

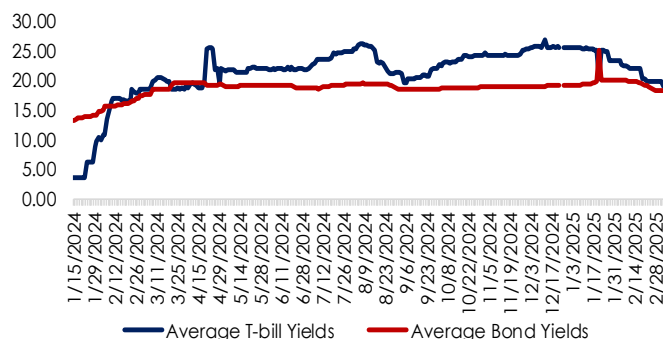
## OUTLOOK

The equities market is expected to trend positively next week as in adopt opportunistic strategies.

RSI of NGX All Share Index

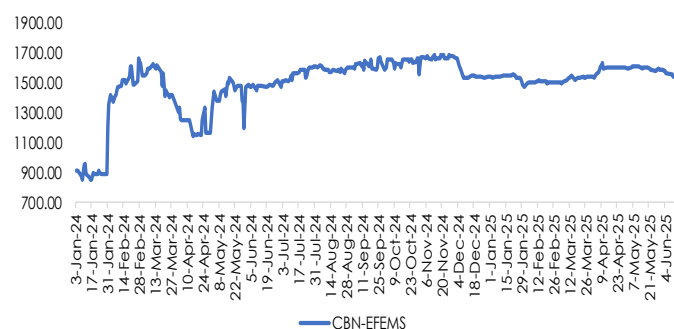


### Fixed Income Yield Trend

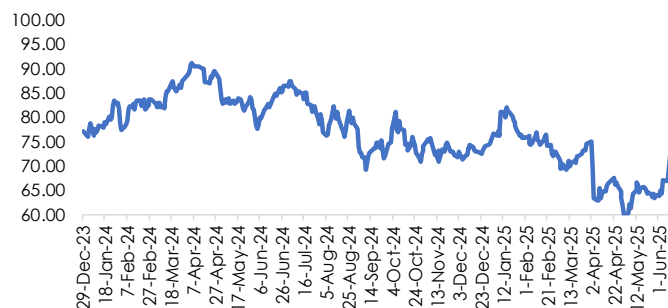


Source: NGX, SCM Capital Research

### Foreign Exchange Rates Trend



### Brent Crude Oil Price



Fixed income market summary		13-Jun-25	11-Jun-25	
T-bills		Current	Previous	Change(bp)
3m		18.42	18.43	↓ 0.02
6m		20.67	20.69	↓ 0.02
12m		23.02	22.99	↑ 0.03
FGN Bonds		Current	Previous	Change(bp)
3yrs		19.30	19.30	→ 0.00
5yrs		19.45	19.45	→ 0.00
7yrs		18.20	18.20	→ 0.00
10yrs		18.56	18.56	→ 0.00
FGN EuroBonds		Current	Previous	Change(bp)
3yrs		8.66	8.57	↑ 0.09
5yrs		9.33	9.22	↑ 0.11
7yrs		9.65	9.48	↑ 0.17
25yrs		10.46	10.37	↑ 0.09
FX		Current	Previous	Change(N)
CBN - EFEMS		1539.72	1540.05	↑ 0.33

Source: FMDQ, CBN, SCM Capital Research

## Money Market

At the secondary NTB market, average yield fell by 2bps to settle at 20.79%. The O/N rate advanced by 4bps to settle at 26.99%.

## Fixed Income

At the secondary Bond market, average yields closed flat at 18.50%.

## Currency

The Naira appreciated by 0.02% at EFEMS, to close at N1,540.05/USD.

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