



Daily Market Recap

Tuesday, 17 June 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	16-Jun-25	17-Jun-25	Change %	YTD (%)
NGX All- Share Index	115,238.24	114,910.16	-0.28	11.64
Market Capitalization (N'Tm)	72.67	72.50	-0.23	15.51
Market Cap. (\$'Bn)	46.90	46.93	0.07	
Total Value Traded (N'Bn)	18.98	25.67	35.20	
Total Value Traded (\$'Mn)	12.25	16.62	35.61	
Total Volume Traded (Mn)	618.55	787.31	27.28	
Number of Deals	18,835	23,170	23.02	
Market Breadth	0.83x			

Sectors	16-Jun-25	17-Jun-25	Change%	YTD (%)
Banks	1,169.13	1,167.35	-0.15	7.64%
Insurance	704.38	706.36	0.28	-1.62%
Consumer Goods	2,514.68	2,503.75	-0.43	44.59%
Oil and Gas	2,359.84	2,324.46	-1.50	-14.29%
Industrial Goods	3,527.53	3,533.59	0.17	-1.08%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CILEASING	4.20	4.62	0.42	10.00%
LEARNAFRCA	3.80	4.18	0.38	10.00%
MBENEFIT	1.00	1.10	0.10	10.00%
UPL	4.99	5.48	0.49	9.82%
DEAPCAP	0.81	0.88	0.07	8.64%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
TRANSPower	328.50	295.70	-32.80	-9.98%
OANDO	64.70	58.25	-6.45	-9.97%
ELLAHLAKES	4.76	4.29	-0.47	-9.87%
OMATEK	0.75	0.68	-0.07	-9.33%
CUSTODIAN	24.90	22.75	-2.15	-8.63%

Source: NGX, SCM Capital Research

NASDAQ OTC Snapshot

Statistics	16-Jun-25	17-Jun-25	Change %	YTD (%)
NSI	3,326.33	3,359.50	1.00	11.88
Market Capitalization (?'Bn)	1,947.73	1,967.15	1.00	91.09
Value Traded (?'000)	21,751.34	23,554.37	8.29	
Volume Traded	479,638	639,427	33.31	
Deals	37	35	-5.41	

Source: NASD, SCM Capital Research

Equities

Bears drag domestic bourse:

Sell-offs in OANDO (-9.97%), UBA (-5.57%), FIRSTHOLDCO (-4.32%), ACCE: 2.20%), and ZENITHBANK (-2.02%), dragged the NGX-ASI down by 0.28% to 114,910.16 points. Consequently, market capitalization decreased by N17 N72.50tm, bringing the YTD return to 11.64%.

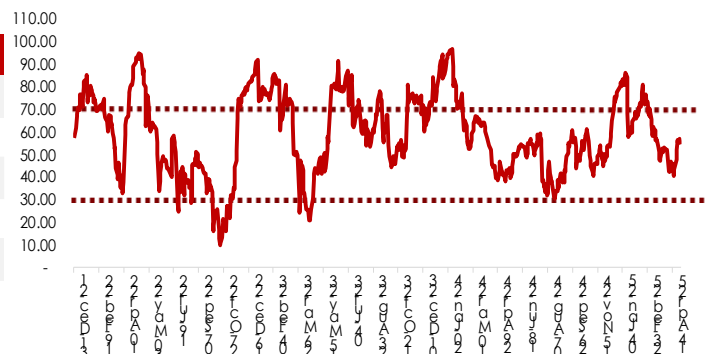
Activity level strengthened as volume and value traded rose by 27.28% a respectively. A total of 787.31m units of shares valued at N25.67bn were ex in 23,170 deals. ZENITHBANK led the volume chart with 96.23m units of shc GTCO led the value charts with 83.35m units of shares traded in de N6.24bn. The market breadth (advance/decline ratio) improved from 0.42 reflective of 29 gainers against 35 decliners.

Performance across tracked indices was largely bearish as the Oil & Gas, t Goods, and Banking indices moderated by 1.50%, 0.43%, and 0.15%, res on the back of price depreciation in OANDO (-9.97%), HONYFLOUR (-2. ZENITHBANK (-2.02%). On the flipside, the Insurance and Industrial Goo advanced by 0.28% and 0.17% respectively, driven by buying in GUINEAINS (+3.90%) and WAPCO (+1.10%).

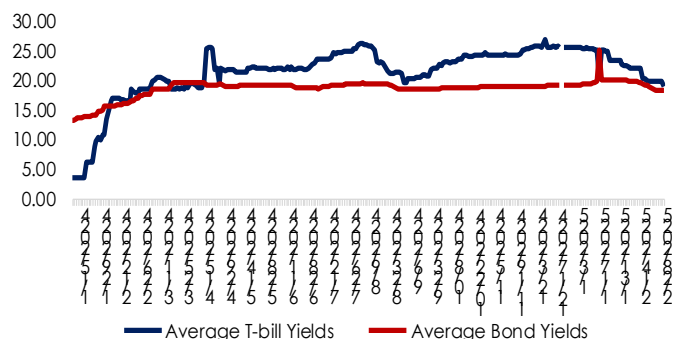
OUTLOOK

This week, investor focus is expected to remain on earnings position strength likely in consumer, industrial, and well-capitalized banking st oil and gas sector may also benefit from geopolitical tailwinds.

RSI of NGX All Share Index

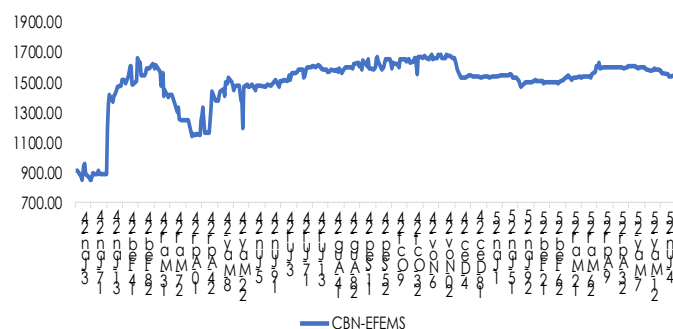


Fixed Income Yield Trend

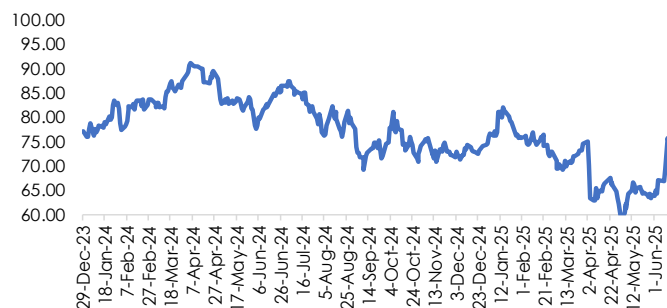


Source: NGX, SCM Capital Research

Foreign Exchange Rates Trend



Brent Crude Oil Price



Fixed income market summary	17-Jun-25	16-Jun-25	
T-bills	Current	Previous	Change(bp)
3m	18.38	18.39	↓ 0.01
6m	20.62	20.63	↓ 0.01
12m	22.96	22.98	↓ 0.01
FGN Bonds	Current	Previous	Change(bp)
3yrs	19.31	19.31	→ 0.00
5yrs	19.46	19.46	→ 0.00
7yrs	18.21	18.21	→ 0.00
10yrs	18.56	18.56	→ 0.00
FGN EuroBonds	Current	Previous	Change(bp)
3yrs	8.45	8.44	↑ 0.01
5yrs	9.09	9.07	↑ 0.02
7yrs	9.45	9.50	↓ 0.05
25yrs	10.38	10.37	↑ 0.01
FX	Current	Previous	Change(N)
CBN - EFEMS	1544.63	1549.35	↑ 4.72

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield moderated by 1bp to settle at 20.76%. The O/N rate declined by 192bps to settle at 26.92%.

Fixed Income

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

Currency

The Naira appreciated by 0.30% at EFEMS, to close at N1,544.63/USD.

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