



Daily Market Recap

Thursday, 19 June 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	18-Jun-25	19-Jun-25	Change %	YTD (%)
NGX All- Share Index	116,786.87	117,861.13	0.92	14.51
Market Capitalization (N'Tm)	73.68	74.36	0.92	18.47
Market Cap. (\$'Bn)	47.68	48.00	0.66	
Total Value Traded (N'Bn)	26.01	22.03	-15.31	
Total Value Traded (\$'Mn)	16.83	14.22	-15.53	
Total Volume Traded (Mn)	640.08	893.97	39.66	
Number of Deals	19,727	17,257	-12.52	
Market Breadth	2.15x			

Sectors	18-Jun-25	19-Jun-25	Change%	YTD (%)
Banks	1,205.27	1,241.32	2.99	14.46%
Insurance	720.61	731.60	1.53	1.89%
Consumer Goods	2,499.65	2,525.22	1.02	45.83%
Oil and Gas	2,498.61	2,504.54	0.24	-7.65%
Industrial Goods	3,536.94	3,542.55	0.16	-0.83%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
IKEJAHOTEL	14.00	15.40	1.40	10.00%
BETAGLAS	250.95	276.00	25.05	9.98%
LEGENDINT	6.55	7.20	0.65	9.92%
UPL	5.48	6.02	0.54	9.85%
ETERNA	38.70	42.50	3.80	9.82%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
GUINEAINS	0.76	0.69	-0.07	-9.21%
HMCALL	4.25	4.00	-0.25	-5.88%
CILEASING	4.62	4.35	-0.27	-5.84%
MCNICHOLS	2.33	2.20	-0.13	-5.58%
FIDSON	43.00	41.00	-2.00	-4.65%

Source: NGX, SCM Capital Research

NASDAQ OTC Snapshot

Statistics	18-Jun-25	19-Jun-25	Change %	YTD (%)
NSI	3,335.35	3,319.78	-0.47	10.56
Market Capitalization (?'Bn)	1,953.01	1,943.89	-0.47	88.83
Value Traded (?'000)	48,080.94	4,557.75	-90.52	
Volume Traded	839,331	262,134	-68.77	
Deals	61	25	-59.02	

Source: NASD, SCM Capital Research

Equities

Buying interests persists:

Buying pressure in FIRSTHOLDCO (+5.71%), ACCESSCORP (+4.06%), MTNI OANDO (+1.48%), and GTCO (+0.95%), drove the NGX-ASI up by 0.92% 117,861.13 points. Consequently, market capitalization increased by N6 N74.36tm, bringing the YTD return to 14.51%.

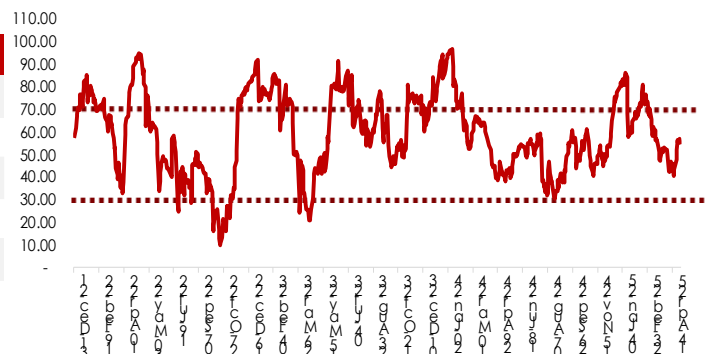
Market activity was mixed as volume traded rose by 39.66% to 893.97 shares, while value traded moderated by 15.31% to N22.03bn. CHAMPI volume chart with 332.29m units, while ZENITHBANK led the value chart v units of shares traded in deals worth N5.00bn. The market breadth (adv ratio) improved from 1.23x to 2.15x, reflective of 43 gainers against 20 dec

Performance across tracked indices was bullish as the Banking, Insur Consumer Goods indices advanced by 2.99%, 1.53% and 1.02%, respective back of bargain hunting in ACCESSCORP (+4.06%), NEM (+8.48%), and D (+3.75%). Similarly, the Oil & Gas and Industrial Goods indices rose by 0.16% on buying interests in OANDO (+1.48%), and BETAGLAS (+9.98%).

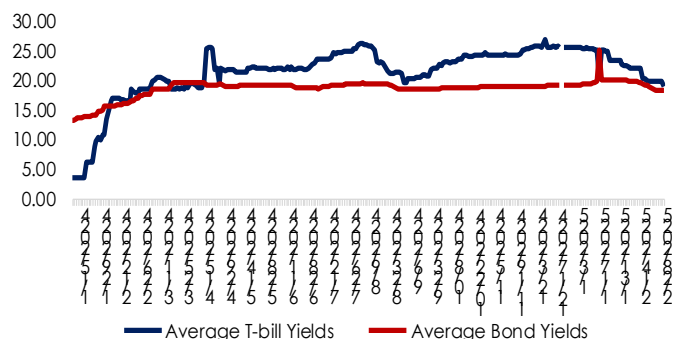
OUTLOOK

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

RSI of NGX All Share Index

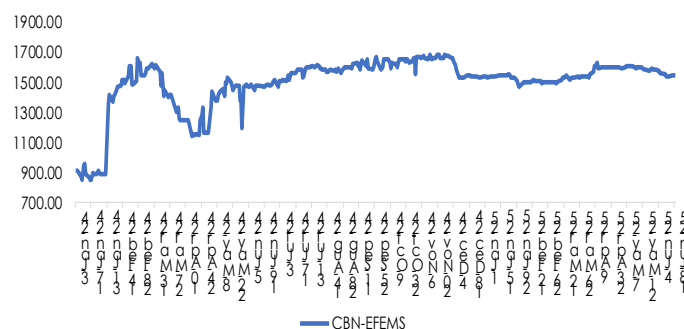


Fixed Income Yield Trend

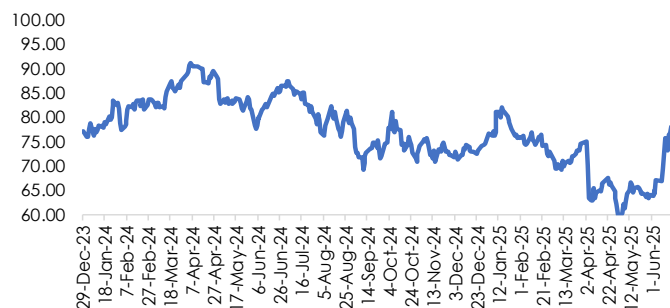


Source: NGX, SCM Capital Research

Foreign Exchange Rates Trend



Brent Crude Oil Price



Fixed income market summary	19-Jun-25	18-Jun-25	
T-bills	Current	Previous	Change(bp)
3m	18.36	18.37	↓ 0.01
6m	20.60	20.61	↓ 0.01
12m	23.02	22.95	↑ 0.07
FGN Bonds	Current	Previous	Change(bp)
3yrs	19.04	19.32	↓ 0.27
5yrs	18.99	19.46	↓ 0.47
7yrs	18.21	18.21	↑ 0.00
10yrs	18.47	18.56	↓ 0.09
FGN EuroBonds	Current	Previous	Change(bp)
3yrs	8.39	8.39	→ 0.00
5yrs	8.99	8.99	→ 0.00
7yrs	9.40	9.40	→ 0.00
25yrs	10.34	10.32	↑ 0.02
FX	Current	Previous	Change(N)
CBN - EFEMS	1549.21	1545.27	↓ 3.94

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield moderated by 17bps to settle at 20.57%. The O/N rate rose by 2bps to settle at 26.96%.

Fixed Income

At the secondary Bond market, average yield declined by 20bps to settle at 18.29%.

Currency

The Naira depreciated by 0.25% at EFEMS, to close at N1,549.21/USD.

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CONTACT

19th Floor, Stock Exchange House, 2-4 Customs Street, Lagos

research@scmcapitalng.com | +234 -01-2802226-8