



Daily Market Recap

Friday, 20 June 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	19-Jun-25	20-Jun-25	Change %	YTD (%)
NGX All- Share Index	117,861.13	118,138.22	0.24	14.78
Market Capitalization (N'Tm)	74.36	74.53	0.24	18.75
Market Cap. (\$'Bn)	48.00	48.10	0.22	
Total Value Traded (N'Bn)	22.03	19.68	-10.65	
Total Value Traded (\$'Mn)	14.22	12.70	-10.66	
Total Volume Traded (Mn)	893.97	522.81	-41.52	
Number of Deals	17,257	17,706	2.60	
Market Breadth	1.33x			

Sectors	19-Jun-25	20-Jun-25	Change%	YTD (%)
Banks	1,241.32	1,261.74	1.65	16.34%
Insurance	731.60	723.77	-1.07	0.80%
Consumer Goods	2,525.22	2,521.07	-0.16	45.59%
Oil and Gas	2,504.54	2,500.43	-0.16	-7.80%
Industrial Goods	3,542.55	3,515.46	-0.76	-1.59%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
LEGENDINT	7.20	7.92	0.72	10.00%
ELLAHLAKES	4.85	5.33	0.48	9.90%
CHAMPION	7.48	8.20	0.72	9.63%
GUINEAINS	0.69	0.75	0.06	8.70%
ETIRANZACT	6.65	7.15	0.50	7.52%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
SUNUASSUR	4.99	4.56	-0.43	-8.62%
NNFM	101.30	93.20	-8.10	-8.00%
THOMASWY	2.17	2.00	-0.17	-7.83%
LIVESTOCK	8.70	8.10	-0.60	-6.90%
NEM	17.90	17.00	-0.90	-5.03%

Source: NGX, SCM Capital Research

NASDAQ OTC Snapshot

Statistics	19-Jun-25	20-Jun-25	Change %	YTD (%)
NSI	3,319.78	3,320.91	0.03	10.60
Market Capitalization (?'Bn)	1,943.89	1,944.56	0.03	88.89
Value Traded (?'000)	4,557.75	15,186.60	233.20	
Volume Traded	262,134	223,039	-14.91	
Deals	25	21	-16.00	

Source: NASD, SCM Capital Research

Equities

Domestic bourse close positive:

The domestic bourse closed the week bullish as the NGX-ASI rose by 0.24 at 118,138.22 points, bringing the YTD return to 14.78%.

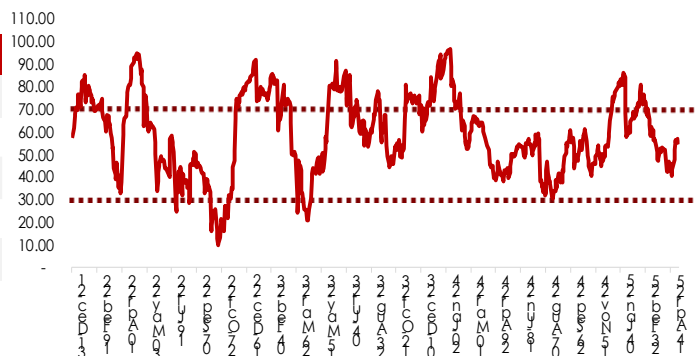
Having gained in three out of five trading session for the week, the bourse closed 2.35% higher w/w. During the week, positive performances recorded by BETAGLAS (+19.43% w/w), GTCO (+18.81% w/w), PRESCO (+11.68% w/w), and ARADEL (+7.36%), were able to offset losses recorded by ZENITHBANK (-0.60% w/w), UBA (-4.84% w/w), and ZENITHBANK (-0.60% w/w).

Market activity strengthened week-on-week, as volume and value advanced by 68% and 120% respectively. A total of 3.46bn units of shares, N112.38bn were exchanged in 96,695 deals over the five days trading session. For today, FIDELITYBK led the volume chart with 38.28m units traded, while OKOMUOIL led the value chart with 7.84m units of shares traded in value of N5.19bn. The market breadth (advance/decline ratio) waned from 2.15:1 to 1.33:1, reflective of 36 gainers against 27 decliners.

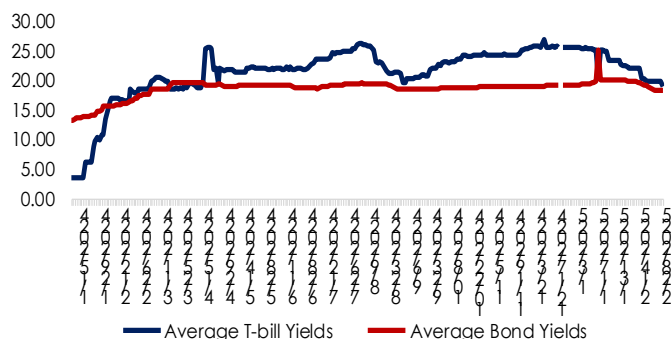
OUTLOOK

Investor focus is expected to remain on earnings positioning in the week, with strength likely in consumer, industrial, and well-capitalized stocks. The oil and gas sector may also benefit from geopolitical tailwinds.

RSI of NGX All Share Index

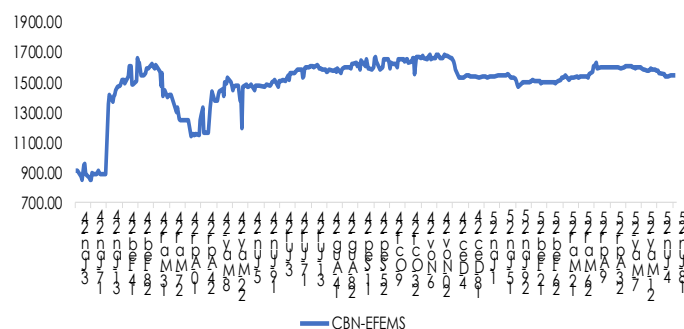


Fixed Income Yield Trend

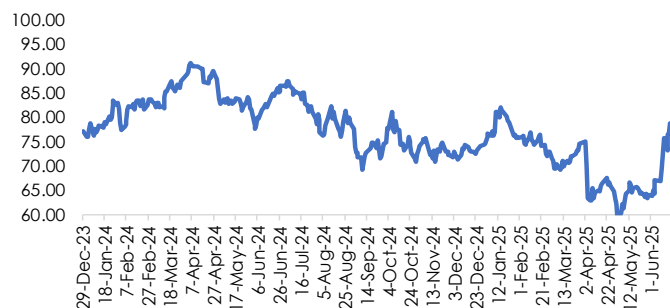


Source: NGX, SCM Capital Research

Foreign Exchange Rates Trend



Brent Crude Oil Price



Fixed income market summary	20-Jun-25	19-Jun-25	
T-bills	Current	Previous	Change(bp)
3m	18.35	18.36	↓ 0.01
6m	20.59	20.60	↓ 0.01
12m	21.93	23.02	↓ 1.09
FGN Bonds	Current	Previous	Change(bp)
3yrs	18.96	19.04	↓ 0.09
5yrs	18.92	18.99	↓ 0.07
7yrs	18.21	18.21	↑ 0.00
10yrs	18.33	18.47	↓ 0.14
FGN EuroBonds	Current	Previous	Change(bp)
3yrs	8.45	8.39	↑ 0.06
5yrs	9.04	8.99	↑ 0.05
7yrs	9.42	9.40	↑ 0.02
25yrs	10.38	10.34	↑ 0.04
FX	Current	Previous	Change(N)
CBN - EFEMS	1549.49	1549.21	↓ 0.28

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield moderated by 8bps to settle at 20.50%. The O/N rate rose by 196bps to settle at 28.92%.

Fixed Income

At the secondary Bond market, average yield declined by 7bps to settle at 18.23%.

Currency

The Naira depreciated by 0.02% at EFEMS, to close at N1,549.49/USD.

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