

Daily Market Recap

Wednesday, 10 June 2026

STOCK MARKET HIGHLIGHTS

NGX Statistics	09-Jun-26	10-Jun-26	Change %	YTD (%)
NGX All- Share Index	244,697.62	244,852.21	0.06	57.35
Market Capitalization (N'Trn)	156.94	157.04	0.06	58.03
Market Cap. (\$'Bn)	115.16	115.43	0.23	
Total Value Traded (N'Bn)	57.87	38.81	-32.94	
Total Value Traded (\$'Mn)	42.47	28.53	-32.83	
Total Volume Traded (Mn)	1,270.49	1,226.40	-3.47	
Number of Deals	56,880	54,128	-4.84	
Market Breadth		0.83x		

Sectors	09-Jun-26	10-Jun-26	Change%	YTD (%)
Banks	2,321.51	2,303.19	-0.79	51.94%
Insurance	1,249.88	1,250.24	0.03	5.12%
Consumer Goods	4,764.50	4,784.58	0.42	20.35%
Oil and Gas	5,684.25	5,692.41	0.14	113.18%
Industrial Goods	11,590.87	11,580.05	-0.09	104.00%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
LIVESTOCK	8.50	9.35	0.85	10.00%
DEAPCAP	4.87	5.35	0.48	9.86%
ABBEYBDS	11.25	12.35	1.10	9.78%
VITAFOAM	194.00	210.00	16.00	8.25%
FTNCOCOA	8.87	9.45	0.58	6.54%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
NEIMETH	10.00	9.00	-1.00	-10.00%
INTENEGINS	8.77	7.90	-0.87	-9.92%
JOHNHOLT	14.90	13.45	-1.45	-9.73%
UHOMREIT	76.55	70.00	-6.55	-8.56%
TIP	33.25	30.45	-2.80	-8.42%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	09-Jun-26	10-Jun-26	Change %	YTD (%)
NSI	4,335.31	4,330.12	-0.12	22.19
Market Capitalization (?'Bn)	2,593.91	2,590.81	-0.12	22.19
Value Traded (?'000)	62,330.70	12,166.29	-80.48	
Volume Traded	1,586,729	117,374	-92.60	
Deals	41	43	4.88	

Source: NASD, SCM Capital Research

Equities
Local bourse close in positive territory.

The local bourse closed in positive territory at the end of today's trading session, as bargain hunting in OANDO (+3.60%), INTBREW (+2.89%), DANGSUGAR (+1.45%), MTNN (+1.27%), among others, lifted the NGX-ASI up by 0.06% to close at 244,852.21 points. Consequently, market capitalization increased by N99.15 billion to N157.04 trillion, while the year-to-date return advanced to 57.35%.

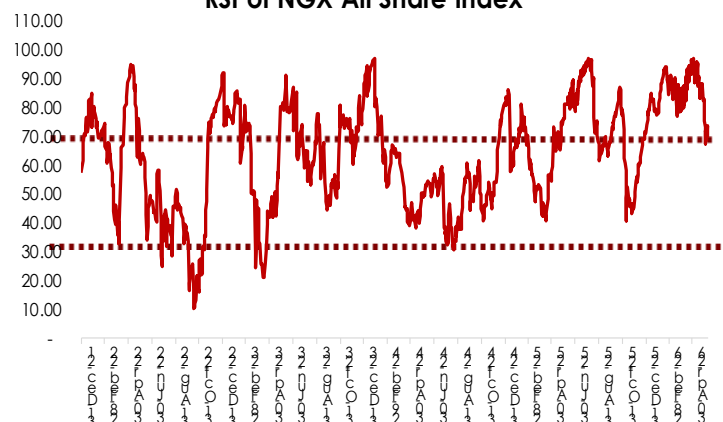
Market activity weakened, as both volume and value traded moderated by 3.47% and 32.94%, respectively. A total of 1.23 billion shares valued at N38.81 billion were exchanged in 54,128 deals. STERLINGNG (+1.28%) led the volume chart with 565.33 million shares traded, while ARADEL (0.00%) topped the value chart with 6.82 million shares worth N3.88 billion.

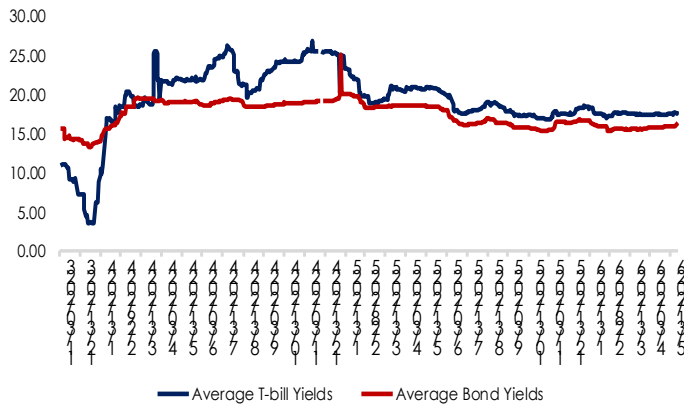
Investor sentiment, as measured by market breadth (advancers-to-decliners ratio), weakened to 0.83x from 1.03x in the previous session, reflecting 30 gainers against 36 decliners.

Performance across the tracked indices was largely bullish, as the Consumer Goods, Oil & Gas, and Insurance Indices advanced by 0.42%, 0.14%, and 0.03%, respectively. On the other hand, the Banking and Industrial Goods Indices declined by 0.79% and 0.09%, respectively.

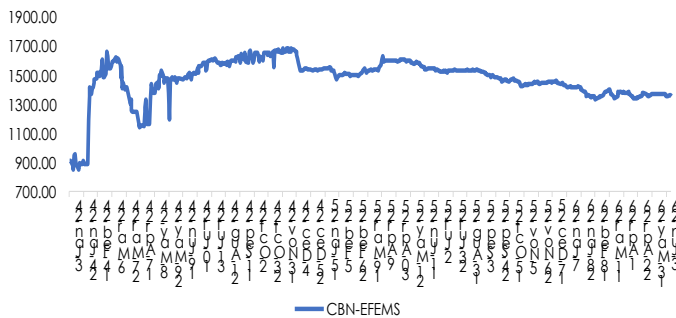
OUTLOOK

We expect mixed sentiments in the equities market.

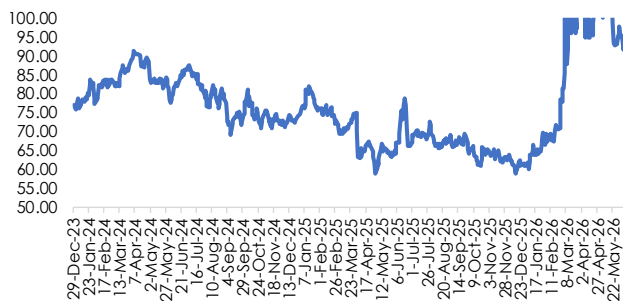
RSI of NGX All Share Index


Fixed Income Yield Trend


Source: FMDQ, SCM Capital Research

Foreign Exchange Rates Trend


Source: CBN, SCM Capital Research

Brent Crude Oil Price

Fixed income market summary

T-bills	10-Jun-26	9-Jun-26	Change(bp)
3m	16.35	16.46	↓ 0.12
6m	17.61	17.46	↑ 0.14
12m	19.52	19.30	↑ 0.22

FGN Bonds	Current	Previous	Change(bp)
3yrs	16.95	16.73	↑ 0.22
5yrs	17.60	17.34	↑ 0.26
7yrs	17.03	17.20	↓ 0.17
10yrs	14.96	14.96	↔ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	6.00	6.00	↔ 0.00
5yrs	6.67	6.67	↔ 0.00
7yrs	6.77	6.78	↓ 0.01
25yrs	7.99	7.95	↑ 0.04

FX	Current	Previous	Change(N)
CBN - EFEMS	1,360.55	1,362.84	↑ 2.29

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield rose by 17bps to settle at 17.81%. The O/N rate fell by 10bps to settle at 22.04%.

Fixed Income

At the secondary Bond market, average yield increased by 9bps to settle at 16.39%.

Currency

The Naira at the EFEMS appreciated by 0.17% at N1,360.55/USD.

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