

Daily Market Recap

Thursday, 11 June 2026

STOCK MARKET HIGHLIGHTS

NGX Statistics	10-Jun-26	11-Jun-26	Change %	YTD (%)
NGX All- Share Index	244,852.21	244,738.74	-0.05	57.27
Market Capitalization (N'Trn)	157.04	156.97	-0.05	57.95
Market Cap. (\$'Bn)	115.43	115.25	-0.16	
Total Value Traded (N'Bn)	38.81	52.79	36.01	
Total Value Traded (\$'Mn)	28.53	38.75	35.86	
Total Volume Traded (Mn)	1,226.40	1,720.53	40.29	
Number of Deals	54,128	49,737	-8.11	
Market Breadth	1.03x			

Sectors	10-Jun-26	11-Jun-26	Change%	YTD (%)
Banks	2,303.19	2,299.26	-0.17	51.68%
Insurance	1,250.24	1,259.41	0.73	5.89%
Consumer Goods	4,784.58	4,773.61	-0.23	20.08%
Oil and Gas	5,692.41	5,698.36	0.10	113.40%
Industrial Goods	11,580.05	11,590.65	0.09	104.19%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CONHALLPLC	7.50	8.25	0.75	10.00%
ENAMELWA	37.00	40.70	3.70	10.00%
LEARNAFRCA	10.00	11.00	1.00	10.00%
UPL	5.00	5.50	0.50	10.00%
ABCTRANS	7.10	7.80	0.70	9.86%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
INTENEGINS	7.90	7.11	-0.79	-10.00%
MAYBAKER	47.00	43.00	-4.00	-8.51%
TRIPPLEG	4.37	4.00	-0.37	-8.47%
ABBEYBDS	12.35	11.40	-0.95	-7.69%
MANSARD	13.50	12.60	-0.90	-6.67%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	10-Jun-26	11-Jun-26	Change %	YTD (%)
NSI	4,330.12	4,375.01	1.04	23.46
Market Capitalization (?'Bn)	2,590.81	2,617.67	1.04	23.46
Value Traded (?'000)	12,166.29	68,508.07	463.10	
Volume Traded	117,374	3,120,426	2558.53	
Deals	43	27	-37.21	

Source: NASD, SCM Capital Research

Equities
Stock Market Reverses Gains.

The stock market closed today's trading session on a negative note, as the NGX-ASI moderated by 0.05% to close at 244,738.74 points. Consequently, market capitalization declined by N72.74 billion to N156.97 trillion, while the year-to-date return settled at 57.27%.

Having gained in three out of four trading sessions this week, the broad index closed 0.88% higher week-on-week. Gains recorded in FIRSHOLDCO (+11.29% w/w), AIRTELAFRI (+10.00% w/w), DANGSUGAR (+8.61% w/w), FCMB (+6.25% w/w), among others, were sufficient to offset losses in FIDSON (-25.86% w/w), OKOMUOIL (-10.00% w/w), and GUINNESS (-9.22% w/w).

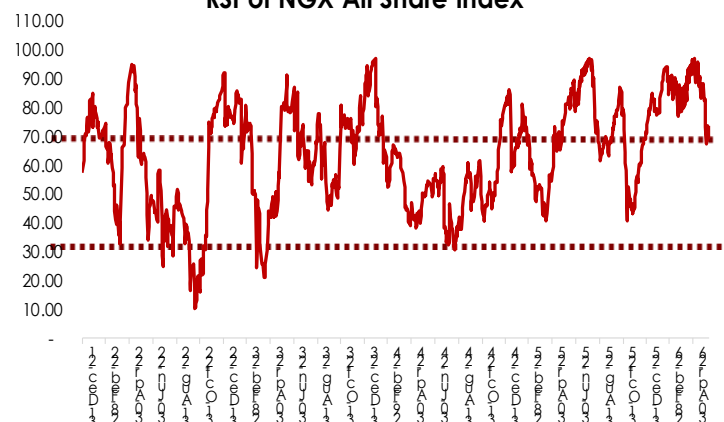
Market activity strengthened week-on-week, as both volume and value traded advanced by 25.15% and 18.14%, respectively. A total of 4.96 billion shares valued at N207.52 billion were exchanged in 235,962 deals.

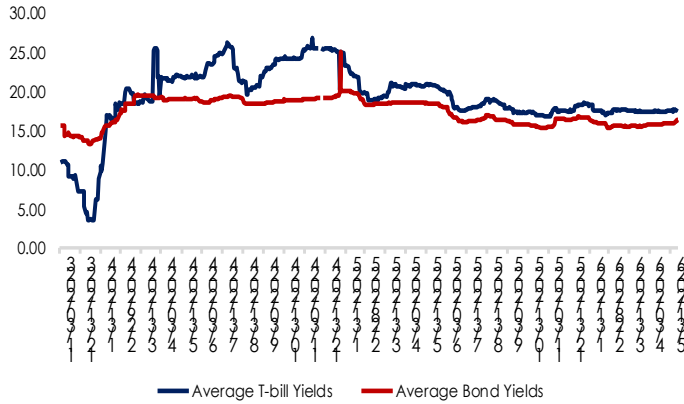
For today, FCMB (0.00%) led the volume chart with 584.87 million shares traded, while ACCESSCORP (-1.20%) topped the value chart with 579.82 million shares worth N13.95 billion.

Investor sentiment, as measured by market breadth (advancers-to-decliners ratio), improved to 1.03x from 0.83x in the previous session, reflecting 32 gainers against 31 decliners.

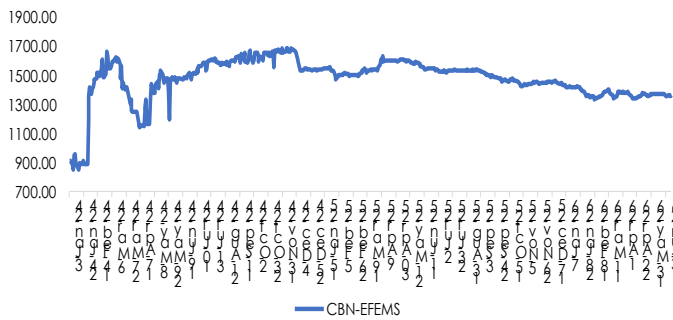
OUTLOOK

We expect mixed sentiments in the equities market.

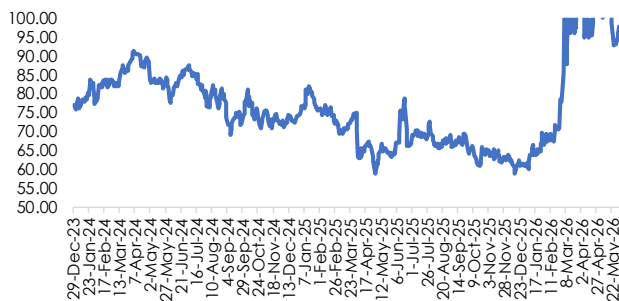
RSI of NGX All Share Index


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	11-Jun-26	10-Jun-26	Change(bp)
3m	16.53	16.35	↑ 0.18
6m	17.60	17.61	↓ 0.01
12m	19.66	19.52	↑ 0.15

FGN Bonds	Current	Previous	Change(bp)
3yrs	17.11	16.95	↑ 0.16
5yrs	17.50	17.60	↓ 0.10
7yrs	17.03	17.03	→ 0.00
10yrs	14.96	14.96	→ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	5.97	6.00	↓ 0.03
5yrs	6.66	6.67	↓ 0.01
7yrs	6.78	6.77	↑ 0.01
25yrs	7.96	7.99	↓ 0.03

FX	Current	Previous	Change(N)
CBN - EFEMS	1,362.05	1,360.55	↓ 1.50

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield rose by 6bps to settle at 17.88%. The O/N rate increased by 12bps to settle at 22.16%.

Fixed Income

At the secondary Bond market, average yield increased by 2bps to settle at 16.41%.

Currency

The Naira at the EFEMS depreciated by 0.11% at N1,362.05/USD.

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