

**Daily Market Recap**

Monday, 15 June 2026

**STOCK MARKET HIGHLIGHTS**

NGX Statistics	11-Jun-26	15-Jun-26	Change %	YTD (%)
NGX All- Share Index	244,738.74	243,204.73	-0.63	56.29
Market Capitalization (N'Trn)	156.97	155.99	-0.63	56.96
Market Cap. (\$Bn)	115.25	114.37	-0.76	
Total Value Traded (N'Bn)	52.79	36.40	-31.05	
Total Value Traded (\$'Mn)	38.75	26.69	-31.14	
Total Volume Traded (Mn)	1,720.53	744.90	-56.71	
Number of Deals	49,737	80,873	62.60	
Market Breadth	0.35x			

Sectors	11-Jun-26	15-Jun-26	Change%	YTD (%)
Banks	2,299.26	2,272.44	-1.17	49.91%
Insurance	1,259.41	1,250.81	-0.68	5.17%
Consumer Goods	4,773.61	4,754.90	-0.39	19.61%
Oil and Gas	5,698.36	5,516.25	-3.20	106.58%
Industrial Goods	11,590.65	11,590.56	-0.00	104.19%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
ROYALEX	1.50	1.65	0.15	10.00%
IKEJAHOTEL	43.15	47.45	4.30	9.97%
CONHALLPLC	8.25	9.04	0.79	9.58%
UPL	5.50	6.00	0.50	9.09%
MANSARD	12.60	13.70	1.10	8.73%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
INTENEGINS	7.11	6.40	-0.71	-9.99%
ETRANZACT	16.55	14.90	-1.65	-9.97%
NEIMETH	8.55	7.70	-0.85	-9.94%
OANDO	53.00	47.80	-5.20	-9.81%
ABBEYBDS	11.40	10.30	-1.10	-9.65%

Source: NGX, SCM Capital Research

**NASD OTC Snapshot**

Statistics	11-Jun-26	15-Jun-26	Change %	YTD (%)
NSI	4,375.01	4,356.84	-0.42	22.94
Market Capitalization (?'Bn)	2,617.67	2,606.79	-0.42	22.94
Value Traded (?'000)	68,508.07	39,185.49	-42.80	
Volume Traded	3,120,426	992,164	-68.20	
Deals	27	23	-14.81	

Source: NASD, SCM Capital Research

**Equities**
**Local Bourse Opens the Week on a Bearish Note.**

The local bourse commenced the first trading session of the week on a negative note, as selloffs in OANDO (-9.81%), FIRSTHOLDCO (-7.25%), ARADEL (-5.65%), ZENITHBANK (-0.80%), GTCO (-0.22%), among others, dragged the NGX-ASI down by 0.63% to close at 243,204.73 points. Consequently, market capitalization declined by N983.88 billion to N155.99 trillion, while the year-to-date return settled at 56.29%.

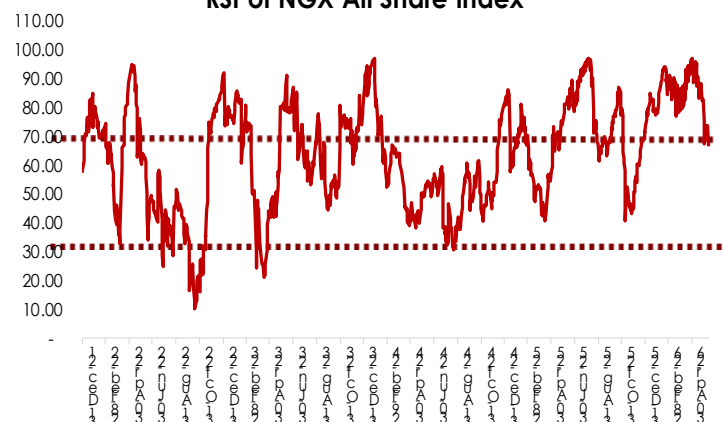
Market activity weakened, as both volume and value traded declined by 56.71% and 31.05%, respectively. A total of 744.90 million shares valued at N36.40 billion were exchanged in 80,873 deals. STERLINGNG (-2.53%) led the volume chart with 112.17 million shares traded, while ARADEL (-5.65%) topped the value chart with 6.71 million shares worth N11.20 billion.

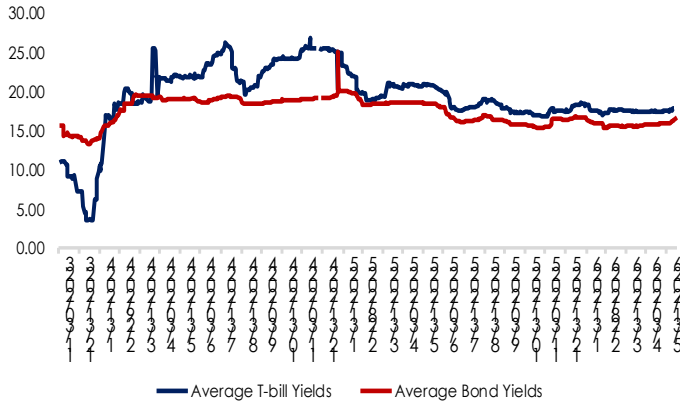
Investor sentiment, as measured by market breadth (advancers-to-decliners ratio), weakened to 0.35x from 1.03x in the previous session, reflecting 17 gainers against 48 decliners.

Performance across tracked indices was negative, as the Oil & Gas, Banking, and Insurance indices declined by 3.20%, 1.17%, and 0.68%, respectively. Similarly, the Consumer Goods and Industrial Goods indices fell by 0.39% and 0.001%, respectively.

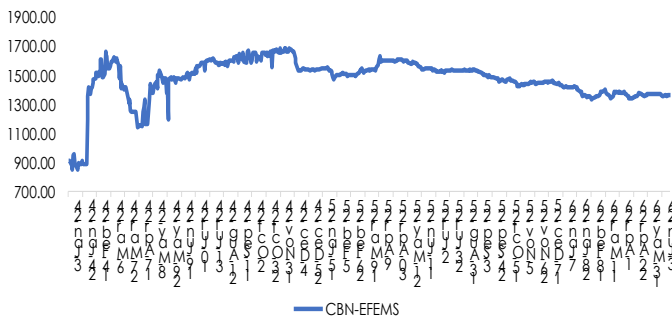
**OUTLOOK**

*We expect mixed sentiments in the equities market.*

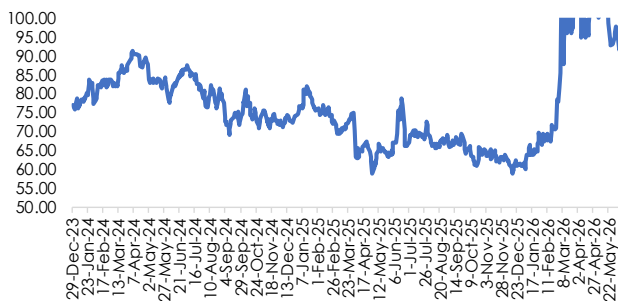
**RSI of NGX All Share Index**


**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	15-Jun-26 Current	11-Jun-26 Previous	Change(bp)
3m	16.66	16.53	↑ 0.13
6m	17.57	17.60	↓ 0.03
12m	19.51	19.66	↓ 0.16

FGN Bonds	Current	Previous	Change(bp)
3yrs	17.05	17.11	↓ 0.06
5yrs	17.48	17.50	↓ 0.02
7yrs	17.41	17.03	↑ 0.38
10yrs	17.34	14.96	↑ 2.38

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	5.83	5.97	↓ 0.14
5yrs	6.54	6.66	↓ 0.12
7yrs	6.63	6.78	↓ 0.15
25yrs	7.86	7.96	↓ 0.10

FX	Current	Previous	Change(N)
CBN - EFEMS	1,363.83	1,362.05	↓ 1.78

Source: FMDQ, CBN, SCM Capital Research

**Money Market**

At the secondary NTB market, average yield fell by 3bps to settle at 17.85%. The O/N rate increased by 7bps to settle at 22.23%.

**Fixed Income**

At the secondary Bond market, average yield increased by 25bps to settle at 16.66%.

**Currency**

The Naira at the EFEMS depreciated by 0.13% at N1,363.83/USD.

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