

Daily Market Report



Wednesday, June 04, 2025

ASI ends the day bullish.... appreciated by 32bps for the day

The local bourse (NGX) closed the day on a bullish note as ASI advanced by **32bps** driven by price appreciation and increased buying interest in all sectoral tickers except **NGXINDUSTR**. As a result, the benchmark All Share Index (ASI) closed positively to settle at **112,781.73**.

Market Capitalization closed positively at **N71.11trillion**, as investors gained **N223.38billion**, and Year-to-date (YtD) gain increased to **9.58%**

What shaped today's market direction

The gains in today's market can majorly be attributed to price appreciation and increase buying interest in **GTCO (2.21%)**, **UBA (0.58%)**, **ACCESSCORP (0.69%)** and **ZENITHBANK (0.41%)** offsetting losses in **NB (-1.81%)**, **WAPCO (-0.06%)**, **ETI (-2.03%)** and **JBERGER (-1.66%)** which kept the ASI in a positive terrain. Gains were recorded in large-cap, mid-cap, and small-cap stocks in all sectoral index except **NGXINDUSTR**. The market breadth measured by advancers/ decliners was positive closing at **1.52x**, indicating more advancers than laggards. The top gainers include **OANDO (10%)**, **UHOMREIT (9.96%)**, **ROYALEX (8.64%)**, **LEGENDINT (7.27%)** and **LASACO (6.67%)**

Sectoral performance was positive

Sectoral performance was positive. All our observed indices closed positively due to increase buying interest in all sectoral tickers except **NGXINDUSTR** which closed negatively. As a result, the year-to-date (YTD) gain increased to **9.58%**

At the close of today's trade, **NCR (-9.89%)**, **ABCTRANS (-9.83%)**, **MEYER (-9.63%)**, **ACADEMY (-9.58%)** and **LIVESTOCK (-6.77%)** were among the **21** market laggards as **127** stocks traded today.

Market activity, measured by aggregate volume, decreased by **3.39%**, with aggregate value depreciating by **1.14%**. Investors traded a total of **601.48mn** units of shares valued at **N15.94bn** in **13,563** deals.

The most active stocks by volume were **FIDELITYBK**, which traded **93.46mn** units, followed by **GTCO** with **87.20mn** units, **ROYALEX** with **73.07mn** units, **UBA** with **57.11mn**, and **ACCESSCORP** with **38.75mn** units.

The most active stocks by value were **GTCO**, which traded **5.95bn** units, followed by **UBA** with **1.97bn** units, **FIDELITYBK** with **1.77bn** units, **ACCESSCORP** with **854.58mn**, and **ZENITHBANK** with **626.16mn** units.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	11.41	0.28
NGXBANK	10.22	0.87
NGXCG	18.45	0.59
NGXINDUSTR	-0.42	-0.01
NGXINS	2.41	0.35
NGXOILGAS	21.45	0.92

NGX Market Indices

All Share Index	112,781.73
Previous ASI	112,427.48
% Day Change	0.32%
% Weekly Change	0.93%
No. of Deals	13,563
Volume	601,489,641
Value	15,940,040,355.52
Market Cap	71,118,359,791,723.70
1 Month High	112,781.73
1 Month Low	102,095.95

NGX Top Gainers

Symbols	Daily	Price (₦)
OANDO	4.70	51.70
UHOMREIT	4.55	50.25
ROYALEX	0.07	0.88
LEGENDINT	0.40	5.90
LASACO	0.20	3.20

NGX Top Losers

Symbols	Daily ▼	Price (₦)
NCR	-0.65	5.92
ABCTRANS	-0.29	2.66
MEYER	-0.90	8.45
ACADEMY	-0.48	4.53
LIVESTOCK	-0.65	8.95

NGX Top Volume

Symbols	Price (₦)	Volumes
FIDELITYBK	19.00	93,467,186
GTCO	69.5	87,203,879
ROYALEX	0.88	73,078,757
UBA	34.7	57,113,893
ACCESSCORP	22.00	38,759,844

NGX Top Value

Symbols	Price (₦)	Values
GTCO	69.50	5,952,288,608.30
UBA	34.70	1,979,780,729.35
FIDELITYBK	19.00	1,776,188,756.20
ACCESSCORP	22.00	854,587,586.00
ZENITHBANK	48.80	626,160,609.75

CORPORATE ACTION

COMPANY	DIVIDEND/SHARE	QUALIFICATION DATE	PAYMENT DATE
FIRSTHOLDCO	0.60	12 th May, 2025	23 rd May, 2025
Fidelity Bank	1.25	16 th April 2025	29 th April 2025
Zenith	5.00	16 th April 2025	29 th April 2025
United capital PLC	0.50	14 th March 2025	4 th April 2025
Seplat	US0.36	9 th May 2025	23 rd May 2025
Oando (Bonus issue) tranche 2	1:12	30 th June 2025	36 months
Transpower	3.50		11 th March 2025
HMCALL	0.07		31 st April 2025
TranscorpHotel	0.64	25 th March 2025	16 th April 2025
NIDF	5.50	30 th January 2025	6 th February 2025
WAPCO	1.20	28 th March 2025	25 th April 2025
NGXGROUP	2.00	13 th March 2025	
Champion Breweries PLC	0.60	9 th May 2025	21 st May 2025
Dangote Cement PLC	30.00	9 th June 2025	23 rd June 2025
BUA Cement PLC	2.05	8 th August 2025	28 th August 2025

NASD Market

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,292.19**. Furthermore, Market Capitalization closed positively at **N1.93trillion**. Market activity measured by aggregate volume decreased by **65.19%**, closing at **434,892 units** while values depreciating by **19.32%** to close **18,465,219.42** in **33** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	42,307.01	42,579.00	0.64%
S&P 500	5,937.75	5,985.25	0.80%
FTSE 100 INDEX	8,787.84	8,807.82	0.23%
GERMAN DAX	24,020.04	24,191.76	0.71%
FRENCH CAC	9,056.03	9,135.20	0.87%
NIKKEI 225	37,446.81	37,747.45	0.80%
NGX (ASI)	112,427.48	112,781.73	0.32%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.46	3.19
INFLATION (%)	23.71	24.23
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50S	27.50
BRENT CRUDE (US \$)	65.73	65.17

WORDS	MEANING
NASD	National Association of Securities Dealers
Bearish	Decline in prices, negative sentiments, downward trend
Bullish	Surge in prices, positive sentiments, upward trend
Y-o-Y	Year-on-Year
M-o-M	Month-on-Month
Y-t-d	Year-to-date
W-o-W	Week-on-week
BPS	Basis Points

MBC Securities Limited

11th Floor, St. Nicholas House,
26, Catholic Mission Street,
Lagos Island, Lagos
Nigeria
+234 02 012708003/4
www.mbcgroup.com.ng

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