

Daily Market Report



Friday, June 27 2025

ASI ends the week bullish by 157bps.... depreciating by 65bps for the day

The local bourse (NGX) closed the week bullish by **157bps**. In today's market, ASI declined by **65bps**, driven by price depreciation and profit taking in all sectoral tickers. As a result, the benchmark All Share Index (ASI) closed negatively to settle at **119,995.76**.

Market Capitalization closed negatively at **N75.96trillion**, as investors lost **N491.82billion**, and Year-to-date (YtD) gain decreased to **16.58%**

What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **ZENITHBANK (-0.51%)**, **GTCO (-0.6%)**, **ACCESSCORP (-2.43%)** and **OANDO (-8.72%)** offsetting gains in **ELLAHLAKES (2.94%)**, **CAVERTON (4.4%)**, **NGXGROUP (0.12%)** and **DANGSUGAR (1.38%)** which kept the ASI in a negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in all sectoral tickers. The market breadth measured by advancers/ decliners was negative closing at 0.81x, indicating more laggards than advancers. The top gainers include **NEIMETH (10%)**, **LEARNAFRCA (9.91%)**, **MECURE (9.91%)**, **ACADEMY (9.44%)** and **ETRANZACT (7.59%)**

Sectoral performance was negative

Sectoral performance was negative. Almost all our observed indices closed negatively due to selling pressure in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINDUSTR**, **NGXINS**, and **NGXOILGAS**. As a result, the year-to-date (YTD) gain increased to **16.58%**

At the close of today's trade, **LEGENDINT (-9.98%)**, **BUACEMENT (-9.92%)**, **FTNCOCOA (-9.76%)**, **OANDO (-8.72%)** and **MCNICHOLS (-8.44%)** were among the **32** market laggards as **128** stocks traded today.

Market activity, measured by aggregate volume, decreased by **17.33%**, with aggregate value depreciating by **45.13%**. Investors traded a total of **625.36mn** units of shares valued at **N12.78bn** in **21,660** deals.

The most active stocks by volume were **JAPAULGOLD**, which traded **88.26mn** units, followed by **ELLAHLAKES** with **80.03mn** units, **ACCESSCORP** with **56.01mn** units, **CAVERTON** with **53.98mn**, and **ZENITHBANK** with **30.54mn** units.

The most active stocks by value were **ZENITHBANK**, which traded **1.75bn** units, followed by **GTCO** with **1.3bn** units, **ACCESSCORP** with **1.24bn** units, **ARADEL** with **788.21mn**, and **OANDO** with **671.58mn** units.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-31.43	-0.70
NGXBNK	-10.08	-0.77
NGXCG	-18.61	-0.54
NGXINDUSTR	-138.19	-3.64
NGXINS	-4.51	-0.60
NGXOILGAS	-24.65	-1.00

NGX Market Indices

All Share Index	119,995.76
Previous ASI	120,772.68
% Day Change	0.65%
% Weekly Change	1.57%
No. of Deals	21,660
Volume	625,368,490
Value	12,781,525,052.27
Market Cap	75,962,149,531,516.50
1 Month High	119,995.76
1 Month Low	115,406.61

NGX Top Gainers

Symbols	Daily	Price (₦)
NEIMETH	0.54	5.94
LEARNAFRCA	0.46	5.10
MECURE	1.10	121.00
ACADEMY	0.44	55.00
ETRANZACT	0.55	7.80

NGX Top Losers

Symbols	Daily ▼	Price (₦)
LEGENDINT	-0.89	8.03
BUACEMENT	-10.50	95.40
FTNCOCOA	-0.36	3.33
OANDO	-5.40	56.50
MCNICHOLS	-0.20	2.17

NGX Top Volume

Symbols	Price (₦)	Volumes
JAPAULGOLD	2.25	88,261,055
ELLAHLAKES	7.00	80,038,219
ACCESSCORP	22.10	56,016,818
CAVERTON	5.22	53,983,155
ZENITHBANK	58.90	30,545,302

NGX Top Value

Symbols	Price (₦)	Values
ZENITHBANK	58.00	1,756,410,391.90
GTCO	82.50	1,301,775,426.75
ACCESSCORP	22.10	1,247,212,888.30
ARADEL	514.50	788,217,919.50
OANDO	56.50	671,587,794.10

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 negatively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **3,308.200**. Furthermore, MarketCapitalization closed negatively at **N1.93trillion**. Market activity measured by aggregate volume decreased by **96.95%** closing at **1,797,425 units** while values depreciated by **98.60%** to close **8,956,490.94** in **48 deals**.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	43,171.15	43,612.82	1.02
S&P 500	6,117.41	6,159.98	0.70
FTSE 100 INDEX	8,739.50	8,757.42	0.21
GERMAN DAX	23,563.59	23,840.73	1.18
FRENCH CAC	8,813.31	8,925.28	1.27
NIKKEI 225	39,584.58	40,150.79	1.43
NGX (ASI)	120,779.05	119,995.76	0.65

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.46	3.19
INFLATION (%)	22.97	23.71
UNEMPLOYMENT (%)	4.30	5.30
MPR (%)	27.50S	27.50
BRENT CRUDE (US \$)	68.15	68.13

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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