

Daily Market Report



Thursday, June 25, 2026

Market Dominated by Bears Today..... as ASI Depreciates by 64bps

In today's market, the local bourse (NGX) closed the day on a bearish note as ASI decreased by **64bps**, 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 **233,580.83pts**.

Market Capitalization closed negatively at **N149.88trillion**, as investors lost **N958.50billion**, and Year-to-date (YtD) gain decreased to **50.10%**.

What shaped today's market direction

The loss in today's market can majorly be attributed to price depreciation and profit taking in **ARADEL (-10.00%)**, **DANGSUGAR (-0.71%)**, **FIRSTHOLDCO (-0.33%)** and **UBA (-1.76%)** offsetting gains in **ZENITHBANK (0.44%)**, **GTCO (0.15%)**, **FIDELITYBK (0.28%)** and **TIP (0.36%)** which kept the ASI in a negative terrain. Losses were recorded in large-cap, mid-cap, and small-cap stocks in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS**, and **NGXOILGAS**. The market breadth measured by advancers/ decliners was negative closing at **0.41x**, indicating more laggards than advancers. The top gainers include **REDSTAREX (9.6%)**, **LEGENDINT (9.09%)**, **NEIMETH (7.1%)**, **ABBEYBDS (5.45%)** and **ELLAHLAKES (4.65%)**.

Sectoral performance was negative

Sectoral performance was negative. All our observed indices closed negatively due to price depreciation and profit taken in **NGX30**, **NGXBNK**, **NGXCG**, **NGXINS**, and **NGXOILGAS**. As a result, the year-to-date (YTD) gain decreased to **50.10%**.

At the close of today's trade **ARADEL (-10.00%)**, **DEAPCAP (-10.00%)**, **TRANSEXPR (-9.9%)**, **REGALINS (-9.57%)** and **CILEASING (-9.48%)** were among the **34** market laggards as **130** stocks traded today.

Market activity measured by aggregate volume decreased by **19.36%**, with aggregate value depreciating by **8.39%**. Investors traded a total of **393.53mn** units of shares valued at **N19.16bn** in **45,592** deals.

The most active stocks by volume were **ACCESSCORP**, which traded **39.05mn** units, followed by **CHAMS** with **24.50mn** units, **FIDELITYBK** with **24.06mn** units, **STERLINGNG** with **23.74mn** units, and **ZENITHBANK** with **18.93mn** units.

The most active stocks by value were **WAPCO**, which traded **N2.24bn**, followed by **ZENITHBANK** with **N2.12bn**, **ARADEL** with **N2.09bn**, **MTNN** with **N1.98bn**, and **GTCO** with **N1.92bn**.

SECTORAL PERFORMANCE

INDEX	CHANGE PRICE	CHANGE PERCENT %
NGX30	-60.01	-0.70
NGXBNK	-6.07	-0.28
NGXCG	-7.55	-0.12
NGXINDUSTR	-0.36	0.00
NGXINS	-30.41	-2.59
NGXOILGAS	-293.45	-5.22

NGX Market Indices

All Share Index	233,580.83
Previous ASI	235,074.54
% Day Change	0.64%
% Weekly Change	1.00%
No. of Deals	45,592
Volume	393,536,771
Value	19,166,093,473.23
Market Cap	149,888,038,869,323.00
1 Month High	244,852.21
1 Month Low	233,580.83

NGX Top Gainers

Symbols	Daily ▲	Price (₦)
REDSTAREX	2.15	24.55
LEGENDINT	0.50	6.00
NEIMETH	0.55	8.30
ABBEYBDS	0.45	8.70
ELLAHLAKES	0.40	9.00

NGX Top Losers

Symbols	Daily ▼	Price (₦)
ARADEL	175.00	1,575.00
DEAPCAP	0.45	4.05
TRANSEXPR	0.40	3.64
REGALINS	0.09	0.85
CILEASING	0.55	5.25

NGX Top Volume

Symbols	Price (₦)	Volumes (units)
ACCESSCORP	23.00	39,052,654
CHAMS	4.02	24,503,935
FIDELITYBK	18.20	24,069,677
STERLINGNG	7.75	23,748,809
ZENITHBANK	115.00	18,935,129

NGX Top Value

Symbols	Price (₦)	Values (₦)
WAPCO	317.40	2,248,134,668.40
ZENITHBANK	115.00	2,128,702,055.95
ARADEL	1,575.00	2,096,039,925.00
MTNN	830.00	1,986,660,735.90
GTCO	130.00	1,925,106,035.45

CORPORATE ACTION

COMPANY	FINAL DIVIDEND/ SHARE	QUALIFICATION DATE	PAYMENT DATE
FCMB Group Plc	0.32	15 June, 2026	30 June, 2026
Mecure industries plc	0.32	April 23, 2026.	Till further notice
Dangote Cement Plc	45.00	June 17, 2026	July 2, 2026

NASD Market

The NASD market closed positively after today's trading activities, as the Unlisted Securities Index (NSI) closed at **4,362.32**. Furthermore, Market Capitalization closed positively at **2,618.33bn**. Market activity measured by aggregate volume decreased to **403,901** units with values decreasing to **10,991,518.62** in **35** deals.

GLOBAL MARKET INDICES

MARKET	PREVIOUS CLOSE	TODAY'S CLOSE	%CHANGE
DJIA	51,848.90	52,584.92	1.42%
S&P 500	7,358.22	7,378.60	0.28%
FTSE 100 INDEX	10,461.63	10,552.03	0.86%
GERMAN DAX	24,740.36	25,074.45	1.35%
FRENCH CAC	9,476.84	9,521.45	0.47%
NIKKEI 225	69,174.97	72,366.34	4.61%
NGX (ASI)	235,074.54	233,580.83	0.64%

MACRO ECONOMIC INDICATORS

PARAMETER	CURRENT	PREVIOUS
GDP (%)	3.89	4.07
INFLATION (%)	15.93	15.69
UNEMPLOYMENT (%)	4.90	4.60
MPR (%)	26.50	26.50
BRENT CRUDE (US \$)	74.36	73.49

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

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