

THE NIGERIAN EQUITY MARKET SUMMARY

Friday, June 27, 2025

Equity Market Records Weekly Growth of 1.57% as Bulls Outpace Late Bears

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	119,995.76	120,811.51	↓ -0.68%
Total Market Cap.	₦ Trillion	75.96	76.48	↓ -0.68%
Total Volume Traded	Million	625.78	878.37	↓ -28.76%
Total Value Traded	₦ Million	12,782.01	17,979.97	↓ -28.91%
Deals		21,800	25,121	↓ -13.22%

The Nigerian equity market closed the week on a bearish note, as key performance indicators (the NGX-ASI and Market Capitalization) declined by 0.68% apiece in today's trading session. This marked the second consecutive day of losses, largely attributed to profit-taking in recently appreciated medium and blue-chip stocks across key sectors, following six straight sessions of sustained gains. Specifically, All-Share index shed 815.75 basis points today, settling at 119,995.76 index points, while the overall market capitalization dropped by approximately ₦516.41 billion, ending the session at ₦75.96 trillion. Nevertheless, on a week-on-week basis, the market still recorded a 1.57% gain, buoyed by earlier bullish momentum. Consequently, investors wealth rose by ₦1.43 trillion over the week.

Market activities were down today as the Total Volume and Total Value of trades reduced by 28.76% and 28.91% respectively. Approximately 625.78 million units valued at ₦12,782.01 million were transacted across 21,800 deals. In terms of volume, JAPAU LGOLD led the activity chat, accounting for 14.13% of the total volume of trades, followed by ELLAHLAKES (12.81%), ACCESSCORP (8.97%), CAVERTON (8.64%), and ZENITHBANK (4.89%), rounding out the top five. ZENITHBANK emerged as the most traded stock in value terms, with 13.75% of the total value of trades on the exchange.

NEIMETH topped the advancers' chart for today with a price appreciation of 10.00 percent, trailed by LEARNAFRCA with (+9.91%) growth, MECURE (+9.91%), ACADEMY (+9.44%), SMURFIT (+9.09%), ETRANSACT (+7.59%) and twenty-one others. Thirty-two (32) stocks depreciated, where LEGENDINT was the top loser, with a price depreciation of -9.98%, as BUACEMENT (-9.92%), OANDO (-8.72%), BERGER (-6.40%), TANTALIZER (-3.21%), and ACCESSCORP (-2.43%) also dipped in price. In that regard, the market breadth closed negative, recording 27 gainers and 32 losers.

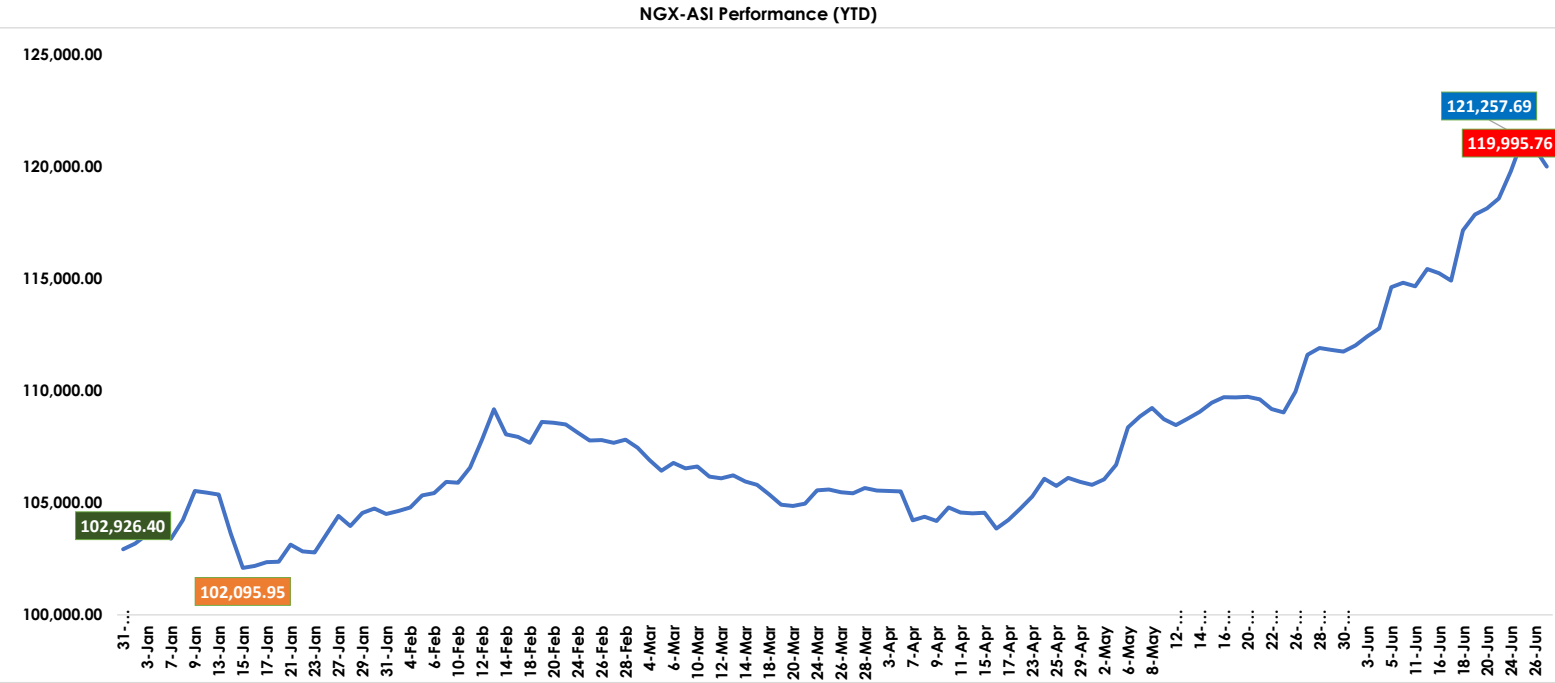
Conclusively, the market sectoral performance was negative today, as four out of the five major market sectors were down, led by the Industrial sector, which declined by (3.64%), followed by the Insurance sector, receded by (1.36%), the Oil & Gas sector by (1.00%), and lastly the Banking sector, dropped by (0.77%). The Consumer goods sector advanced by 0.17%.

Best 10 Performers	OPEN (₦)	Close (₦)	%Change
NEIMETH	5.40	5.94	10.00%
LEARNAFRCA	4.64	5.10	9.91%
MECURE	11.10	12.20	9.91%
ACADEMY	4.66	5.10	9.44%
SMURFIT	0.55	0.60	9.09%
ETTRANSACT	7.25	7.80	7.59%
JAPAU LGOLD	2.11	2.25	6.64%
CWG	11.00	11.50	4.55%
CAVERTON	5.00	5.22	4.40%
NPFMCRFBK	2.12	2.20	3.77%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
LEGENDINT	8.92	8.03	-9.98%
BUACEMENT	105.90	95.40	-9.92%
FTNCOCOA	3.69	3.33	-9.76%
OANDO	61.90	56.50	-8.72%
MCNICHOLS	2.37	2.17	-8.44%
BERGER	32.05	30.00	-6.40%
LASACO	3.05	2.90	-4.92%
UNIVINSURE	0.65	0.62	-4.62%
OMATEK	0.74	0.71	-4.05%
NSLTECH	0.60	0.58	-3.33%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
JAPAU LGOLD	Oil & Gas	88,261,055	14.13%
ELLAHLAKES	Agriculture	80,038,219	12.81%
ACCESSCORP	Banking	56,016,818	8.97%
CAVERTON	Services	53,983,155	8.64%
ZENITHBANK	Banking	30,545,302	4.89%
FIDELITYBK	Banking	24,173,131	3.87%
UBA	Banking	16,287,489	2.61%
GTCO	Banking	15,778,777	2.53%
UNIVINSURE	Insurance	13,950,026	2.23%
OANDO	Oil & Gas	11,462,273	1.83%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
ZENITHBANK	1,756,410,391.90	13.75%
GTCO	1,301,775,426.75	10.19%
ACCESSCORP	1,247,212,888.30	9.76%
ARADEL	788,217,919.50	6.17%
OANDO	671,587,794.10	5.26%
UBA	585,354,949.15	4.58%
ELLAHLAKES	555,749,176.21	4.35%
NAHCO	486,428,205.10	3.81%
FIDELITYBK	481,735,669.50	3.77%



Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↓	-0.68%	NGX-30	↓		-0.70% ↑	16.22%
Week-on-Week	↑	1.57%	Banking	↓		-0.77% ↑	19.36%
Month-to-Date	↑	13.57%	Consumer Goods	↑		0.17% ↑	51.02%
Quarter-to-Date	↑	13.57%	Industrial Goods	↓		-3.64% ↑	2.27%
Year-to-Date	↑	16.58%	Insurance	↓		-1.36% ↑	4.50%
52-Weeks High		121,257.69	Oil & Gas	↓		-1.00% ↓	-9.86%
52-Weeks Low		95,718.05					

Economic Indicators	Today	Previous Day	A-Day Change	YTD % Change	NTB True Yield	Closed	A-day Change
Exchange Rate - I&E (₹/\$)	1536.08	1549.26 ↓	-0.86% ↑	0.29%	1-Month	17.36% ↓	-0.12%
Exchange Rate - Parallel (₹/\$)	1570.00	1560 ↑	0.64% ↑	4.56%	3-Month	18.49% ↓	-0.13%
Monetary Policy Rate (MPR)	27.50%	27.50% →	0.00% →	0.00%	6-Month	20.10% ↓	-0.15%
Crude Oil Price (\$/Barrel)	67.15	66.69 ↑	0.69% ↓	-10.03%	9-Month	21.55% ↓	-0.16%
Foreign Reserve (\$'Bn)	37.41	37.47 ↓	-0.14% ↓	-8.47%	12-Month	22.00% ↓	-0.25%
Inflation Rate	22.97%	22.97% →	0.00% ↓	-11.63%			

Note : -Crude oil (Brent) and Foreign Exchange price represents spot price as at the time this report was prepared
-Foreign reserves figures have two-day lag
-Inflation figure as at May 2025
-NTB True Yield have a day's lag

Disclaimer
This report by Atlas Portfolio Ltd is for information purposes only. While opinions and estimates therein have been carefully prepared, the company and its employees do not guaranty the complete accuracy of the information contained herewith as information was also gathered from various sources believed to be reliable and accurate at the time of this report. We do not take responsibility therefore for any loss arising from the use of the information contained herein.