

THE NIGERIAN EQUITY MARKET SUMMARY

Monday, June 30, 2025

Equity Market Posts Double Digit Returns in Q2 and H1 2025

Key Market Indicators	Units	Today	Previous Day	% Change
The All -Share Index	Basis Points	119,978.57	119,995.76	↓ -0.01%
Total Market Cap.	₦ Trillion	75.95	75.96	↓ -0.01%
Total Volume Traded	Million	2,031.88	625.78	↑ 224.70%
Total Value Traded	₦ Million	44,336.64	12,782.01	↑ 246.87%
Deals		25,172	21,800	↑ 15.47%

The Nigerian domestic market began the new trading week on a tepid note, as key performance indicators (the NGX-ASI and Market Capitalization) posted slight declines of 0.01% apiece. Despite a positive market breadth, the marginal downturn was driven by profit-taking activities in some medium and large-cap stocks, particularly within the Banking and Industrial sectors. Specifically, All-Share index shed 17.19 basis points today, settling at 119,978.57 index points, while the overall market capitalization dropped by approximately ₦10.89 billion, ending the session at ₦75.95 trillion. Nevertheless, on a broader scale, the market performance remains strong. The ASI advanced by 13.55% in Q2'2025, while the market gained 16.57% in the first Half of the Year, reflecting sustained investor confidence. Consequently, investors wealth expanded by a substantial by ₦13.19 trillion in H1'25.

Market activities were up today as the Total Volume and Total Value of trades increased by 224.70% and 246.87% respectively. Approximately 2,031.88 million units valued at ₦44,336.64 million were transacted across 25,172 deals. In terms of volume, OANDO led the activity chat, accounting for 26.16% of the total volume of trades, followed by ACCESSCORP (23.15%), UACN (9.08%), ELLAHLAKES (4.10%), and CAVERTON (3.93%), rounding out the top five. OANDO emerged also as the most traded stock in value terms, with 45.91% of the total value of trades on the exchange.

CWG topped the advancers' chart for today with a price appreciation of 10.00 percent, trailed by CAVERTON with (+9.96%) growth, NEIMETH (+9.93%), FTNCOCOA (+9.91%), MEYER (+9.84%), WAPIC (+9.66%) and twenty-six others. Thirty-one (31) stocks depreciated, where LEARNAFRCA was the top loser, with a price depreciation of -10.00%, as JBERGER (-9.97%), LEGENDINT (-7.22%), VFDGROUP (-6.08%), WAPCO (-3.00%), and STANBIC (-2.30%) also dipped in price. In that regard, the market breadth closed slightly positive, recording 32 gainers and 31 losers.

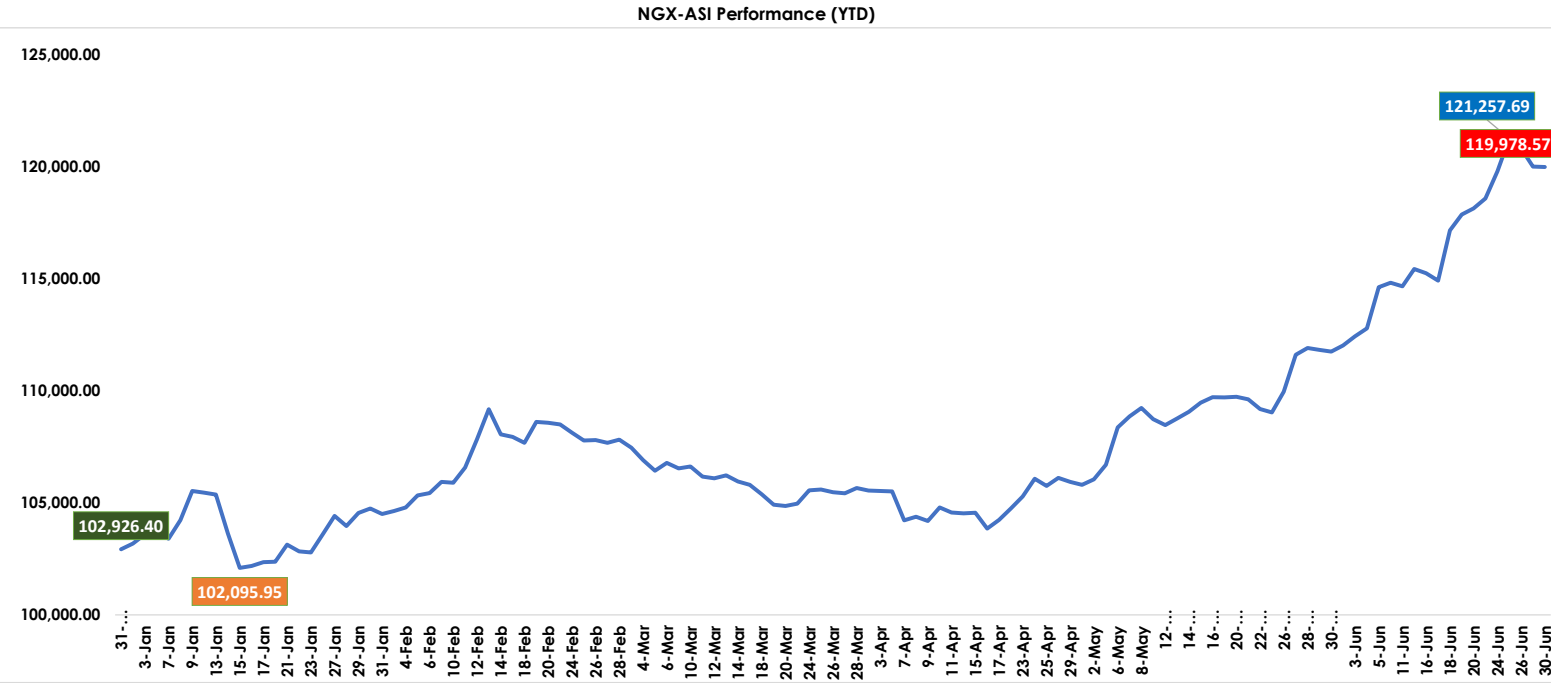
In addition, the market sectoral performance was negative today, as three out of the five major market sectors were down, led by the Banking sector, which declined by (1.09%), followed by the Industrial sector, receded by (0.42%), and lastly the Oil & Gas sector, dropped by (0.29%). The Consumer goods and Insurance sectors recorded gains of 0.79% and 0.69% accordingly.

Best 10 Performers	OPEN (₦)	Close (₦)	%Change
CWG	11.50	12.65	10.00%
CAVERTON	5.22	5.74	9.96%
NEIMETH	5.94	6.53	9.93%
FTNCOCOA	3.33	3.66	9.91%
MEYER	9.15	10.05	9.84%
WAPIC	2.07	2.27	9.66%
TIP	7.55	8.25	9.27%
ELLAHLAKES	7.00	7.64	9.14%
CUSTODIAN	25.05	27.10	8.18%
CAP	47.10	50.95	8.17%

Worst 10 Performers	OPEN (₦)	Close (₦)	%Change
LEARNAFRCA	5.10	4.59	-10.00%
JBERGER	124.40	112.00	-9.97%
CILEASING	5.15	4.64	-9.90%
THOMASWY	2.08	1.88	-9.62%
DAARCOMM	0.61	0.56	-8.20%
UPDC	3.52	3.25	-7.67%
LEGENDINT	8.03	7.45	-7.22%
UPL	6.00	5.60	-6.67%
LASACO	2.90	2.71	-6.55%
VFDGROUP	14.80	13.90	-6.08%

Top 10 Traders By Volume	Sector	Volume (Units)	% of Mkt Volme
OANDO	Oil & Gas	371,073,060	26.16%
ACCESSCORP	Banking	328,380,990	23.15%
UACN	Conglomerate	128,778,026	9.08%
ELLAHLAKES	Agriculture	58,224,670	4.10%
CAVERTON	Services	55,742,813	3.93%
JAPAUFGOLD	Oil & Gas	47,954,576	3.38%
UNIVINSURE	Insurance	23,420,297	1.65%
VFDGROUP	Investment	22,686,289	1.60%
CILEASING	Services	22,479,870	1.58%
ZENITHBANK	Banking	21,819,687	1.54%

Top 10 Traders By Value	Value (₦)	% of Mkt Value
OANDO	19,870,509,338.45	45.91%
ACCESSCORP	7,226,543,422.55	16.70%
UACN	4,444,776,219.75	10.27%
NESTLE	1,655,118,028.50	3.82%
ZENITHBANK	1,244,886,488.60	2.88%
GTCO	972,009,509.10	2.25%
NB	680,804,144.80	1.57%
UBA	539,054,353.75	1.25%
ARADEL	461,320,062.20	1.07%



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Market Performance History			Sector Indices		A-Day Change		YTD % Change
A-Day Change	↓	-0.01%	NGX-30	↓		-0.16% ↑	16.03%
Week-on-Week	↑	1.18%	Banking	↓		-1.09% ↑	18.06%
Month-to Date	↑	7.37%	Consumer Goods	↑		0.79% ↑	52.21%
Quarter-to-Date	↑	13.55%	Industrial Goods	↓		-0.42% ↑	1.85%
Year-to-Date	↑	16.57%	Insurance	↑		0.69% ↑	5.23%
52-Weeks High		121,257.69	Oil & Gas	↓		-0.29% ↓	-10.12%
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 (R/\$)	1539.24	1536.08	↑	0.21% ↑	0.08%	1-Month	17.45% ↑ 0.09%
Exchange Rate - Parallel (R/\$)	1560.00	1570	↓	-0.64% ↑	5.17%	3-Month	18.52% ↑ 0.03%
Monetary Policy Rate (MPR)	27.50%	27.50%	→	0.00% →	0.00%	6-Month	20.44% ↑ 0.33%
Crude Oil Price (\$/Barrel)	66.75	66.8	↓	-0.07% ↓	-10.57%	9-Month	21.81% ↑ 0.27%
Foreign Reserve (\$'Bn)	37.37	37.41	↓	-0.12% ↓	-8.58%	12-Month	21.99% ↓ 0.00%
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

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