

Trading activity was strong as the volume of shares traded rose by 20.41% to 620.35 million units,



# DAILY MARKET REPORT

Nigerian Market Highlight: Equity, Fixed Income & Money Market Review

TUESDAY, 10TH JUNE 2025

## Equities Market

- The Nigerian equities market closed negative, as the All-Share Index (ASI) declined by 52bps to close at 114,017.48 points, trimming YTD return to 10.78%.
- Despite the dip, market breadth remained positive with 35 gainers against 25 losers.
- ETRANZACT, DAARCOMM, an dBERGER (+10%each) led the gainers' chart, while RTBRISCOE (-10%) topped the laggards. ACCESSCORP and GTCO dominated the volume and value charts with 88.3million units and ₦3.34billion, respectively.
- The Banking Index rose 27bps on gains in FIDELITYBK, UBA, and GTCO, though losses in ACCESSCORP (-4.74%) and ZENITHBANK dragged momentum. Consumer stocks outperformed, pushing the Consumer Goods Index up 256bps, led by strength in VITAFOAM and BUAFOODS.
- The Oil & Gas Index fell 284bps due to a sharp decline in ARADEL, while the Industrial Index shed333bps, largely from BETAGLAS. Value traded dropped 43.61% to \$12.21m.

## Money Market

- Interbank liquidity stayed stable, aided by ₦264bn OMO maturities despite CRR debits. Rates remained around 26.5%; OPR was flat at 26.50%, and O/N rate dipped 1bp to 26.95%.

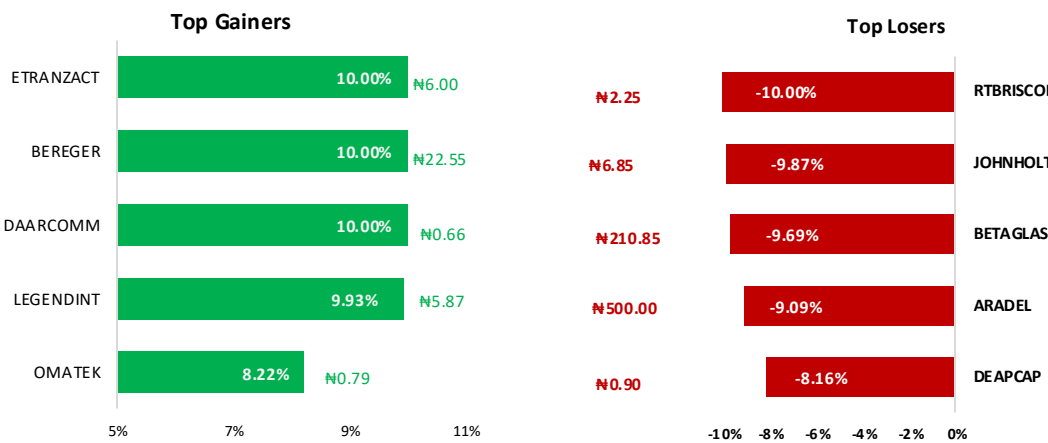
## Treasury Bills Market

- T-Bills market activity was subdued, with few trades in select OMO maturities. Benchmark NTB mid-rate edged 4bps lower to 19.24%.

## Bonds Market

- FGN Bonds trading remained light, centered on May 2033s (19.30%-19.40%) and some mid-tenors. Despite low volumes, the benchmark mid-yield dipped slightly to 18.55%.
- Nigeria's Eurobonds performed positively amid US-China trade talks, with yields tightening 9bps to 9.08%. Constructive discussions boosted sentiment, though caution persisted over rare earth and tariff uncertainties.

MARKET OVERVIEW		10/06/2025	05/06/2025	Change
NGXASI		112,782	114,616.75	-1.60%
Value Traded		16.68 billion	₦33.47 billion	-83.62%
Volume Traded		5,482,264,300	1.46 billion	-88.72%
Market Capitalization		71.28trillion	72.28trillion	-1.38%
SECTOR INDICES	10/06/2025	D-o-D	W-o-W	MTD
NGX30	4209.49	-0.27%	1.65%	-1.87%
NGXBNK	1221.51	0.27%	3.63%	-4.80%
NGXOILANDGAS	2336.32	-2.84%	0.37%	-0.16%
NGXINS	703.51	-0.60%	1.05%	-1.96%
NGXIND	3369.71	-3.33%	-3.10%	2.22%
NGXPENSION	5425.61	0.02%	2.60%	-3.18%
NGXLOTUS	8402.27	-1.59%	0.76%	-0.96%



MONEY MARKET	10/06/2025	05/06/2025
Open Repo (%)	26.50	26.50%
Overnight (%)	26.95	26.96%
TREASURY BILLS YIELD	10/02/2025	05/02/2025
91-Days	18.36%	19.45%
182-Days	19.50%	21.54%
350-Days	23.19%	23.27%
EXCHANGE RATE	10/06/2025	05/06/2025
FX Close (₦/\$)	1,540.0481	1,553.1200

FGN EUROBONDS	Yield (%)	Price (₦)	Change in yield
7.625 21-NOV-2025	6.63	100.42	-0.32
6.50 NOV-28-2027	7.67	97.41	-0.06
8.375 MAR-24-2029	8.62	99.21	-0.03
8.747 JAN-21-2031	9.28	97.69	-0.02
7.875 16-FEB-2032	9.55	91.85	-0.03
7.625 NOV-28-2047	10.33	76.56	-0.05
9.248 JAN-21-2049	10.41	89.81	-0.07

GLOBAL MARKET	10/06/2025	D-o-D	W-o-W	M-o-M	YTD
S&P 500	6,038.81	0.44%	1.14	6.69	2.67%
Nasdaq	19,714.99	0.32%	1.31	9.96	2.12%
FTSE	8,858.90	0.16%	0.79	2.92	7.22%
CAC	7,804.33	0.53%	0.69	-0.42	-2.58%
DAX	23,987.56	0.77%	-0.26	1.96	3.73%

## Alternatives

- Brent prices increased by 1.11% to \$67.72 per barrel at the time of writing.
- WTI crude prices increased by 1.29% to \$65.82 per barrel.
- Gold prices decreased by 0.36% to \$3,355.42 per ounce at the time of writing.

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