

### Daily Market Wrap

- NSE market tracking indicators all receded down for the third consent trading day on Wednesday, August 28, 2024, on what appears to be early relaxation of prices before closure of the H1-2024 earning season. NASI lost 0.8% followed by 0.7%, 0.6% and 0.2% losses on NSE 20, NSE 25 and NSE 10 respectively.
- Market activity, however, jumped 37.1% up from 21.600Mn to 29.62Mn shares supported heavy foreign transactions on Safaricom which emerged the day's top gainer with KES 259.19Mn of 17.81Mn shares. Overall foreign activity rose from 35.2% to 55.1% supported mainly Safaricom which recorded an average foreign activity of 79.4% out of the KES 259.18Mn market activity.
- Sector wise, telecommunication, Safaricom lost the most at 1.7% from KES 14.80 to KES 14.55 per share held down by the recent staged stiff competition in the internet service provision and Ethiopia's devalued currency and high inflation.
- Banks lost 0.2% on average, still held down by I&M Holdings at a 7.3% loss from KES 22.60 to KES 20.95 per share as its price continued to stabilize down. Overall Banks' activity fell by banks fell 124.1% from 3.93Mn to 8.81Mn shares.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,087.03	1,088.94	-0.2%
NSE 20 Share Index	1,683.75	1,694.90	-0.7%
NSE 25 Share Index	2,802.22	2,818.85	-0.6%
NASI	103.42	104.21	-0.8%
Mkt Capitalization(Bn)	1,615.77	1,628.14	-0.8%
Volumes Traded (Mn)	29.62	21.60	37.1%
Equities Turnover (Mn)	396.65	404.30	-1.9%
Bonds Turnover(Mn)	2,869.65	4,035.30	-28.9%
DAY's TOP MOVERS			Av. Foreign
Turnovers (KES Mn)	Price		%
Safaricom	259.18	14.55	79.4%
KCB Group	69.90	31.20	0.3%
Absa (K)	20.11	14.45	48.2%
EABL	19.89	152.75	0.0%
Kenya Power	7.57	2.37	33.9%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	55.1%	35.2%	
Foreign Buys %	48.3%	24.9%	
Foreign Buys (KES Mn)	191.94	100.79	47.5%
Foreign Buys (USD Mn)	1.49	0.78	47.5%
Top Foreign Buys (KES Mn)			
	Volumes-Mn	Foreign Buy	%Δ
Safaricom	17.81	171.02	66.0%
Absa (K)	1.39	19.37	96.5%
Equity Group	0.08	0.49	15.4%
KCB Group	2.24	0.44	0.6%
Co-op Bank	0.08	0.43	40.4%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts	-	31	-
Open contracts	405	405	0.0%
Total Value	-	463,900	-

Top Gainers List			
Counter	28-Aug-24	27-Aug-24	%Δ
TPS	14.60	13.30	9.8%
Sanlam Kenya	5.98	5.52	8.3%
Scan-Group	2.04	1.90	7.4%
Unga Group	13.10	12.25	6.9%
Totalenergies	21.30	19.95	6.8%

Top Losers Chart			
Counter	28-Aug-24	27-Aug-24	%Δ
Trans-Century	0.32	0.35	-8.6%
Cables	0.83	0.90	-7.8%
I&M Group	20.95	22.60	-7.3%
Jubilee	150.00	159.75	-6.1%
Sameer	2.12	2.24	-5.4%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-53.78	-82.82	-35.1%
Foreign Sales %	61.9%	45.4%	
Foreign Sales (KES Mn)	245.71	183.60	-25.3%
Foreign Sales (USD Mn)	1.90	1.42	-25.3%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	17.81	240,278.89	92.8%
Kenya Power	3.19	5,119.99	67.8%
Trans-Century	0.49	102.56	64.4%
Sameer	0.06	100.81	79.8%
Bamburi	0.01	67.50	11.0%
Currency Performance			
	28-Aug-24	27-Aug-24	%Δ
KES/USD	129.1614	129.1846	0.0%
G15 KES/GBP	170.9645	170.4914	-0.3%
KES/EUR	144.2410	144.4348	0.1%
KES/JPY	89.5058	89.6151	0.1%

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### Equities Pricelist - 28 August 2024

	High	Low	28-Aug-24	27-Aug-24	Volume	Value Traded	Foreign Buys	Foreign Sales
<b>AGRICULTURAL</b>								
Eaagads Ltd Ord 1.25 AIMS	-	-	11.65	11.65	-	-	-	-
Kakuzi Plc Ord.5.00	399.00	399.00	399.00	380.00	500	199,500	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	224.00	224.00	224.00	224.00	300	67,200	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	365.00	365.00	-	-	-	-
Sasini Plc Ord 1.00	17.00	17.00	17.00	16.85	200	3,400	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	-	-	215.00	215.00	-	-	-	-
<b>AUTOMOBILES &amp; ACCESSORIES</b>								
Car & General (K) Ltd Ord 5.00	-	-	21.00	21.00	-	-	-	-
<b>BANKING</b>								
ABSA Bank Kenya Plc Ord 0.50	14.50	13.95	14.45	14.50	1,391,600	20,108,620	19,373,145	-
BK Group Plc Ord 0.80	32.80	32.00	32.55	32.20	300	9,765	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	45.85	45.25	45.50	45.55	11,200	509,600	-	-
Equity Group Holdings Plc Ord 0.50	41.00	40.50	40.75	40.50	78,300	3,190,725	492,000	4,065
HF Group Plc Ord 5.00	4.40	4.14	4.29	4.10	67,100	287,859	-	-
I&M Group Plc Ord 1.00	22.00	20.50	20.95	22.60	18,700	391,765	-	-
KCB Group Plc Ord 1.00	31.60	31.00	31.20	31.50	2,240,500	69,903,600	441,000	-
NCBA Group Plc Ord 5.00	42.85	42.20	42.45	42.05	32,400	1,375,380	17,130	-
Stanbic Holdings Plc ord.5.00	122.00	122.00	122.00	123.00	7,100	866,200	-	-
Standard Chartered Bank Kenya Ltd Ord 5.00	207.00	200.50	201.25	203.25	2,500	503,125	-	20,050
The Co-operative Bank of Kenya Ltd Ord 1.00	13.90	13.20	13.60	13.45	79,000	1,074,400	434,250	-
<b>COMMERCIAL AND SERVICES</b>								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.08	1.02	1.07	1.09	2,800	2,996	-	-
Express Kenya Plc Ord 5.00AIMS	3.40	3.40	3.40	3.20	100	340	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	-	-	3.83	3.83	-	-	-	-
Longhorn Publishers Plc Ord 1.00AIMS	2.31	2.31	2.31	2.31	2,400	5,544	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.10	1.97	1.98	2.01	103,400	204,732	158,400	-
Nation Media Group Plc Ord. 2.50	15.00	15.00	15.00	15.00	400	6,000	-	-
Sameer Africa Plc Ord 5.00	2.31	2.10	2.12	2.24	59,600	126,352	-	100,810
Standard Group Plc Ord 5.00	-	-	6.40	6.40	-	-	-	-
TPS Eastern Africa Ltd Ord 1.00	14.60	14.60	14.60	13.30	100	1,460	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.17	0.18	0.18	18,800	3,384	-	-
WPP Scangroup Plc Ord 1.00	2.07	1.92	2.04	1.90	2,200	4,488	-	-
<b>CONSTRUCTION &amp; ALLIED</b>								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	67.50	64.75	65.75	64.50	9,300	611,475	-	67,500
Crown Paints Kenya Plc Ord 5.00	33.00	33.00	33.00	33.00	300	9,900	-	-
E.A.Cables Ltd Ord 0.50	0.91	0.81	0.83	0.90	164,600	136,618	-	820
E.A.Portland Cement Co. Ltd Ord 5.00	7.72	7.32	7.56	7.36	500	3,780	-	-
<b>ENERGY &amp; PETROLEUM</b>								
KenGen Co. Plc Ord. 2.50	2.65	2.45	2.50	2.58	2,076,600	5,191,500	-	-
Kenya Power & Lighting Co Plc Ord 2.50	2.70	2.30	2.37	2.49	3,193,300	7,568,121	-	5,119,987
Kenya Power & Lighting Plc 4% Pref 20.00	-	-	4.00	4.00	-	-	-	-
Kenya Power & Lighting Plc 7% Pref 20.00	-	-	6.00	6.00	-	-	-	-
TotalEnergies Marketing Kenya Plc Ord 5.00	21.80	20.10	21.30	19.95	500	10,650	-	-
Umeme Ltd Ord 0.50	16.45	16.00	16.40	16.40	6,800	111,520	-	-
<b>INSURANCE</b>								
Britam Holdings Plc Ord 0.10	5.72	5.52	5.66	5.74	6,400	36,224	-	-
CIC Insurance Group Ltd Ord.1.00	2.05	1.98	2.00	1.98	80,700	161,400	-	-
Jubilee Holdings Ltd Ord 5.00	164.00	150.00	150.00	159.75	11,500	1,725,000	-	16,400
Kenya Re Insurance Corporation Ltd Ord 2.50	1.20	1.14	1.19	1.17	1,092,300	1,299,837	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	5.50	5.30	5.32	5.30	1,600	8,512	-	-
Sanlam Kenya Plc Ord 5.00	6.00	5.54	5.98	5.52	1,700	10,166	-	-
<b>INVESTMENT</b>								
Centum Investment Co Plc Ord 0.50	8.66	8.22	8.62	8.60	25,800	222,396	-	-
Home Afrika Ltd Ord 1.00GEMS	0.33	0.30	0.31	0.30	269,800	83,638	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.00	3.00	3.00	2.90	200	600	-	-
Trans-Century Plc Ord 0.50AIMS	0.37	0.32	0.32	0.35	493,600	157,952	-	102,562
<b>INVESTMENT SERVICES</b>								
Nairobi Securities Exchange Plc Ord 4.00	5.98	5.80	5.96	5.98	10,600	63,176	-	-

MANUFACTURING & ALLIED	High	Low	28-Aug-24	27-Aug-24	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	-	-	76.00	76.00	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	345.00	343.50	344.25	344.00	700	240,975	-	-
Carbacid Investments Plc Ord 1.00	17.00	16.80	16.85	16.85	69,900	1,177,815	-	-
East African Breweries Plc Ord 2.00	156.00	150.00	152.75	152.75	130,200	19,888,050	-	-
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.04	1.01	1.01	1.04	36,600	36,966	-	-
Kenya Orchards Ltd Ord 5.00AIMS	-	-	19.50	19.50	-	-	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	13.10	13.10	13.10	12.25	100	1,310	-	-
TELECOMMUNICATION	High	Low	28-Aug-24	27-Aug-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	14.85	14.40	14.55	14.80	17,813,000	259,179,150	171,020,080	240,278,885
REAL ESTATE INVESTMENT TRUST	High	Low	28-Aug-24	27-Aug-24	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	-
EXCHANGE TRADED FUNDS	High	Low	28-Aug-24	27-Aug-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3025i	3025i	3,025.00	2,860.00	-	-	-	-

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