

### Daily Market Wrap

- NSE market prices turned up on Tuesday, 1st October 2024, gaining 0.2% on overall. All the four indices went up with NASI, NSE 20 & NSE 25 gaining 0.2% each as NSE 10 gathered 0.1%. Market activity also jumped up by over three times to 9.90Mn shares, pushing the value traded. 80.0% up from KES 76.35Mn to KES 137.46Mn
- Safaricom's activity spiked to emerge the day's top mover with KES 110.83Mn from 7.39Mm shares compared to 4.8Mn shares it traded on Monday.
- East African Portland maintained a 10.0% rise from KES 31.65 to KES 34.80 per share after trading only 7,100 shares. We view the continued rise in the Cement manufacturer's price as occasioned by the much-anticipated special dividend expected in FY-2024 financials. This is despite the counter recording a loss of KES 720.79Mn in H1-2024. This is purely pegged on the sale of its idle assets as part of ongoing reforms geared to clear its debts and revamp production, as per the statement issued by its management on 12<sup>th</sup> September 2024. Further, refurbishment of its plant seems to be bearing fruits with its August 2024 cement production estimated at 50,000 tonnes against a target of 83,000 tonnes according to management plan.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,126.32	1,124.72	0.1%
N20 Share Index	1,779.75	1,775.67	0.2%
NSE 25 Share Index	2,906.02	2,899.20	0.2%
NASI	107.31	107.08	0.2%
Mkt Capitalization(Bn)	1,679.86	1,676.24	0.2%
Volumes Traded (Mn)	9.90	3.93	151.9%
Equities Turnover (Mn)	137.46	76.35	80.0%
Bonds Turnover(Mn)	4,051.35	5,024.50	-19.4%
DAY's TOP MOVERS			
Turnovers (KES Mn)	Price	Av. Foreign %	
Safaricom	110.83	15.00	52.8%
Centum	5.04	9.66	0.0%
KCB Group	4.20	34.65	5.6%
Co-op Bank	3.12	13.50	15.8%
Equity Group	2.39	44.30	89.2%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	28.3%	28.3%	
Foreign Buys %	19.0%	19.0%	
Foreign Buys (KES Mn)	14.66	14.66	0.0%
Foreign Buys (USD Mn)	0.11	0.11	0.0%
Top Foreign Buys (KES Mn)			
	Volumes-Mn	Foreign Buy	%Δ
Equity Group	0.05	9.00	96.2%
KCB Group	0.12	2.68	11.2%
Safaricom	7.39	1.93	40.1%
Co-op Bank	0.23	0.33	31.7%
Absa New Gold	-	0.31	100.0%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts	-	-	-
Open contracts	337	337	0.0%
Total Value	-	-	-

Top Gainers List			
Counter	1-Oct-24	30-Sep-24	%Δ
Portland cement	34.80	31.65	10.0%
Kakuzi	439.75	400.00	9.9%
Home Africa	0.34	0.31	9.7%
Kenya Orchards	25.00	22.95	8.9%
Liberty Kenya	5.76	5.36	7.5%

Top Losers Chart			
Counter	1-Oct-24	30-Sep-24	%Δ
Car-General	23.00	25.50	-9.8%
Flame tree	1.04	1.14	-8.8%
Eaagad	11.60	12.65	-8.3%
Trans-Century	0.40	0.42	-4.8%
NMG	14.90	15.45	-3.6%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-14.29	-14.29	0.0%
Foreign Sales %	37.6%	37.6%	
Foreign Sales (KES Mn)	28.95	28.95	0.0%
Foreign Sales (USD Mn)	0.22	0.22	0.0%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Jubilee	0.00	16.10	97.1%
Equity Group	0.05	7.70	82.2%
Safaricom	7.39	3.16	65.6%
Kakuzi	0.00	1.64	100.0%

Currency Performance			
	1-Oct-24	30-Sep-24	%Δ
KES/USD	129.1879	129.1957	0.0%
G15 KES/GBP	172.8470	173.0253	0.0%
KES/EUR	143.9089	144.2405	0.2%
KES/JPY	89.5056	90.9669	1.6%

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### Equities Pricelist

	High	Low	1-Oct-24	30-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
<b>AGRICULTURAL</b>								
Eaagads Ltd Ord 1.25 AIMS	12.50	11.50	11.60	12.65	1,100	12,760	-	-
Kakuzi Plc Ord.5.00	439.75	439.75	439.75	400.00	100	43,975	-	1,640,000
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	-	-	228.50	228.50	-	-	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	365.00	365.00	-	-	-	-
Sasini Plc Ord 1.00	17.00	17.00	17.00	16.75	4,800	81,600	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	218.00	218.00	218.00	218.00	900	196,200	-	-
<b>AUTOMOBILES &amp; ACCESSORIES</b>								
Car & General (K) Ltd Ord 5.00	23.00	23.00	23.00	25.50	100	2,300	-	-
<b>BANKING</b>								
ABSA Bank Kenya Plc Ord 0.50	14.10	14.00	14.05	14.05	52,900	743,245	-	39,620
BK Group Plc Ord 0.80	33.50	33.50	33.50	33.50	100	3,350	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	50.00	48.50	49.25	49.20	31,900	1,571,075	-	-
Equity Group Holdings Plc Ord 0.50	44.90	43.65	44.30	43.85	53,900	2,387,770	9,002,000	7,696,540
HF Group Plc Ord 5.00	4.29	4.09	4.13	4.24	9,000	37,170	-	-
I&M Group Plc Ord 1.00	23.60	23.05	23.55	23.50	56,700	1,335,285	51,920	-
KCB Group Plc Ord 1.00	35.00	34.00	34.65	34.70	121,200	4,199,580	2,678,700	-
NCBA Group Plc Ord 5.00	44.00	42.10	43.45	42.70	36,500	1,585,925	-	-
Stanbic Holdings Plc ord.5.00	127.00	117.00	118.50	117.25	2,600	308,100	93,600	-
Standard Chartered Bank Kenya Ltd Ord 5.00	210.75	210.00	210.50	210.00	800	168,400	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	13.95	13.25	13.50	13.35	231,000	3,118,500	331,250	-
<b>COMMERCIAL AND SERVICES</b>								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.18	1.00	1.05	1.08	10,100	10,605	-	-
Express Kenya Plc Ord 5.00AIMS	-	-	3.50	3.50	-	-	-	-
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	2.60	2.60	2.60	2.45	500	1,300	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	-	-	2.04	2.04	-	-	-	-
Nation Media Group Plc Ord. 2.50	15.20	14.55	14.90	15.45	5,700	84,930	-	-
Sameer Africa Plc Ord 5.00	2.59	2.59	2.59	2.59	500	1,295	-	-
Standard Group Plc Ord 5.00	-	-	5.60	5.60	-	-	-	-
TPS Eastern Africa Ltd Ord 1.00	14.70	14.70	14.70	14.10	700	10,290	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.18	0.18	0.18	86,300	15,534	-	-
WPP Scangroup Plc Ord 1.00	2.20	2.13	2.20	2.20	7,000	15,400	-	-
<b>CONSTRUCTION &amp; ALLIED</b>								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	59.50	58.75	59.00	58.75	12,200	719,800	-	-
Crown Paints Kenya Plc Ord 5.00	30.20	29.50	29.95	30.20	2,600	77,870	-	-
E.A.Cables Ltd Ord 0.50	0.99	0.98	0.98	0.98	8,600	8,428	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	34.80	34.80	34.80	31.65	7,100	247,080	-	-
<b>ENERGY &amp; PETROLEUM</b>								
KenGen Co. Plc Ord. 2.50	3.00	2.95	2.98	3.00	126,700	377,566	-	-
Kenya Power & Lighting Co Plc Ord 2.50	3.60	3.50	3.54	3.50	305,000	1,079,700	-	34,600
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	21.65	21.50	21.60	21.80	1,000	21,600	-	-
Umeme Ltd Ord 0.50	16.50	16.00	16.50	16.40	7,500	123,750	-	-
<b>INSURANCE</b>								
Britam Holdings Plc Ord 0.10	6.20	6.00	6.00	5.96	161,000	966,000	19,800	-
CIC Insurance Group Ltd Ord.1.00	2.11	2.02	2.09	2.04	60,700	126,863	10,300	-
Jubilee Holdings Ltd Ord 5.00	162.00	160.00	161.00	160.25	200	32,200	-	16,096,000
Kenya Re Insurance Corporation Ltd Ord 2.50	1.29	1.25	1.27	1.29	312,200	396,494	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	5.76	5.76	5.76	5.36	200	1,152	-	-
Sanlam Kenya Plc Ord 5.00	6.60	6.54	6.58	6.34	800	5,264	-	-
<b>INVESTMENT</b>								
Centum Investment Co Plc Ord 0.50	10.40	9.40	9.66	9.48	522,200	5,044,452	-	-
Home Afrika Ltd Ord 1.00GEMS	0.34	0.29	0.34	0.31	23,800	8,092	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	2.95	2.92	2.93	2.85	900	2,637	-	-
Trans-Century Plc Ord 0.50AIMS	0.43	0.38	0.40	0.42	84,200	33,680	-	-

<b>INVESTMENT SERVICES</b>	<b>High</b>	<b>Low</b>	<b>1-Oct-24</b>	<b>30-Sep-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Nairobi Securities Exchange Plc Ord 4.00	6.20	6.10	6.18	6.08	11,200	69,216	40,300	-
<b>MANUFACTURING &amp; ALLIED</b>	<b>High</b>	<b>Low</b>	<b>1-Oct-24</b>	<b>30-Sep-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
B.O.C Kenya Plc Ord 5.00	-	-	79.00	79.00	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	350.00	343.00	346.25	343.50	1,900	657,875	137,400	275,350
Carbacid Investments Plc Ord 1.00	22.50	22.00	22.30	22.75	7,600	169,480	-	-
East African Breweries Plc Ord 2.00	154.75	148.00	151.50	154.75	2,300	348,450	-	15,800
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.14	1.03	1.04	1.14	137,300	142,792	-	-
Kenya Orchards Ltd Ord 5.00AIMS	25.00	25.00	25.00	22.95	100	2,500	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	16.50	16.50	16.50	16.30	100	1,650	-	-
<b>TELECOMMUNICATION</b>	<b>High</b>	<b>Low</b>	<b>1-Oct-24</b>	<b>30-Sep-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Safaricom Plc Ord 0.05	15.00	14.95	15.00	15.00	7,388,400	110,826,000	1,929,010	3,155,370
<b>REAL ESTATE INVESTMENT TRUST</b>	<b>High</b>	<b>Low</b>	<b>1-Oct-24</b>	<b>30-Sep-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	51,920	-
<b>EXCHANGE TRADED FUNDS</b>	<b>High</b>	<b>Low</b>	<b>1-Oct-24</b>	<b>30-Sep-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
ABSA New Gold ETF	3205i	3205i	3,205.00	3,140.00	-	-	314,000	-

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