

### Daily Market Wrap

- Equities prices further rose on mid-week, 2nd October, gaining 0.3% on overall. NSE 10 gained 0.7% as NSE 20 & NSE 25 gathered 0.5% each. Volumes traded jumped 222.4% up from 9.90Mn to 31.92Mn shares elevated by improved and heavy activity in Safaricom plc. As a result, the total value traded accelerated 296.8% from KES 137.46Mn to KES 545.38Mn
- Safaricom remained the top mover for the second day consecutive at KES 395.77Mn of 26.38Mn shares, representing 72.6% and 82.7% of market value activity respectfully. The telco's price however remained stabilized at KES 15.00 despite a rise in its foreign entries to 76.4% of all its buys, compared to foreign sales of 33.1% of all its sales of the day.
- Banks traded only 3.63Mn shares of KES 128.40Mn, led by KCB Group which transacted 3.04Mn shares of KES 106.46Mn. Focus on KCB Group saw its price 1.2% up from KES 34.65 to KES 35.05 per share
- East African Portland price rose further by 9.9% from KES 34.80 to KES 38.25 per share after trading 700 shares only. We view price surge 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	1,133.67	1,126.32	0.7%
N20 Share Index	1,788.16	1,779.75	0.5%
NSE 25 Share Index	2,919.87	2,906.02	0.5%
NASI	107.68	107.31	0.3%
Mkt Capitalization (Bn)	1,685.52	1,679.86	0.3%
Volumes Traded (Mn)	31.92	9.90	222.4%
Equities Turnover (Mn)	545.38	137.46	296.8%
Bonds Turnover(Mn)	4,047.75	4,051.35	-0.1%
DAY's TOP MOVERS			
Turnovers (KES Mn)	Price	Av. Foreign %	
Safaricom	395.77	15.00	54.8%
KCB Group	106.46	35.05	7.3%
Equity Group	11.63	44.35	68.8%
EABL	10.65	155.00	97.9%
StanChart	5.03	209.75	14.2%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	44.7%	28.3%	
Foreign Buys %	60.8%	19.0%	
Foreign Buys (KES Mn)	332.63	14.66	95.6%
Foreign Buys (USD Mn)	2.57	0.11	95.6%
Top Foreign Buys (KES Mn)			
Volumes-Mn	Foreign Buy	%Δ	
Safaricom	26.38	302.04	76.4%
Equity Group	0.26	10.67	91.8%
EABL	0.07	10.58	99.4%
KCB Group	3.04	8.50	8.0%
Kenya Power	0.82	0.32	11.3%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts	22	-	-
Open contracts	341	337	1.2%
Total Value	619,950	-	-

Top Gainers List			
Counter	2-Oct-24	1-Oct-24	%Δ
Kenya Orchards	27.50	25.00	10.0%
Portland cement	38.25	34.80	9.9%
NBV	2.20	2.04	7.8%
Eveready	1.13	1.05	7.6%
Standard Group	6.00	5.60	7.1%

Top Losers Chart			
Counter	2-Oct-24	1-Oct-24	%Δ
Longhorn	2.35	2.60	-9.6%
Sanlam Kenya	6.02	6.58	-8.5%
Sameer	2.41	2.59	-6.9%
Car-General	21.65	23.00	-5.9%
Liberty Kenya	5.46	5.76	-5.2%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	175.93	-14.29	-1330.9%
Foreign Sales %	28.6%	37.6%	
Foreign Sales (KES Mn)	156.70	28.95	-81.5%
Foreign Sales (USD Mn)	1.21	0.22	-81.5%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	26.38	131.11	33.1%
EABL	0.07	10.26	96.4%
KCB Group	3.04	7.00	6.6%
Equity Group	0.26	5.32	45.7%

Currency Performance			
	2-Oct-24	1-Oct-24	%Δ
KES/USD	129.1988	129.1879	0.0%
G15 KES/GBP	171.4533	172.8470	0.0%
KES/EUR	142.8616	143.9089	0.7%
KES/JPY	89.9306	89.5056	-0.5%

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### Equities Pricelist

AGRICULTURAL	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	11.50	11.40	11.45	11.60	3,300	37,785	-	37,790
Kakuzi Plc Ord.5.00	-	-	439.75	439.75	-	-	-	-
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	17.45	16.55	16.80	17.00	33,200	557,760	-	102,925
Williamson Tea Kenya Plc Ord 5.00AIMS	218.00	218.00	218.00	218.00	200	43,600	-	-
AUTOMOBILES & ACCESSORIES	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	23.00	21.00	21.65	23.00	1,000	21,650	-	-
BANKING	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	14.10	13.95	14.00	14.05	54,400	761,600	-	148,400
BK Group Plc Ord 0.80	-	-	33.50	33.50	-	-	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	49.25	49.00	49.10	49.25	9,000	441,900	225,400	142,100
Equity Group Holdings Plc Ord 0.50	44.95	44.30	44.35	44.30	262,200	11,628,570	10,673,560	5,318,465
HF Group Plc Ord 5.00	4.20	4.10	4.11	4.13	33,400	137,274	-	-
I&M Group Plc Ord 1.00	23.60	23.10	23.50	23.55	87,300	2,051,550	-	-
KCB Group Plc Ord 1.00	35.40	34.70	35.05	34.65	3,037,500	106,464,375	8,502,780	7,001,280
NCBA Group Plc Ord 5.00	44.00	43.50	43.65	43.45	4,900	213,885	-	-
Stanbic Holdings Plc ord.5.00	118.00	118.00	118.00	118.50	500	59,000	-	-
Standard Chartered Bank Kenya Ltd Ord 5.00	210.25	207.00	209.75	210.50	24,000	5,034,000	-	1,426,300
The Co-operative Bank of Kenya Ltd Ord 1.00	14.00	13.50	13.65	13.50	117,700	1,606,605	-	941,530
COMMERCIAL AND SERVICES	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.15	1.08	1.13	1.05	6,500	7,345	-	-
Express Kenya Plc Ord 5.00AIMS	3.50	3.50	3.50	3.50	100	350	-	-
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	2.35	2.35	2.35	2.60	400	940	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.23	2.10	2.20	2.04	4,500	9,900	-	-
Nation Media Group Plc Ord. 2.50	16.25	15.00	15.05	14.90	6,800	102,340	-	-
Sameer Africa Plc Ord 5.00	2.59	2.35	2.41	2.59	1,200	2,892	-	-
Standard Group Plc Ord 5.00	6.00	6.00	6.00	5.60	900	5,400	-	-
TPS Eastern Africa Ltd Ord 1.00	14.70	14.60	14.70	14.70	1,500	22,050	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.17	0.18	0.18	1,600	288	-	-
WPP Scangroup Plc Ord 1.00	2.33	2.20	2.27	2.20	1,000	2,270	-	-
CONSTRUCTION & ALLIED	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	59.50	58.75	59.00	59.00	38,600	2,277,400	-	-
Crown Paints Kenya Plc Ord 5.00	-	-	29.95	29.95	-	-	-	-
E.A.Cables Ltd Ord 0.50	0.99	0.97	0.99	0.98	14,900	14,751	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	38.25	38.25	38.25	34.80	700	26,775	-	-
ENERGY & PETROLEUM	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	3.10	2.98	3.00	2.98	234,100	702,300	-	-
Kenya Power & Lighting Co Plc Ord 2.50	3.59	3.44	3.50	3.54	815,900	2,855,650	321,650	161,351
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	21.50	21.50	21.50	21.60	1,600	34,400	-	-
Umeme Ltd Ord 0.50	17.90	16.50	16.65	16.50	120,800	2,011,320	-	-
INSURANCE	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	6.50	5.74	6.12	6.00	14,100	86,292	-	-
CIC Insurance Group Ltd Ord.1.00	2.11	2.04	2.10	2.09	38,700	81,270	-	-
Jubilee Holdings Ltd Ord 5.00	162.00	161.00	161.25	161.00	1,300	209,625	177,100	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.29	1.25	1.27	1.27	229,200	291,084	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	5.76	5.40	5.46	5.76	3,100	16,926	-	-
Sanlam Kenya Plc Ord 5.00	6.02	6.02	6.02	6.58	2,000	12,040	-	-
INVESTMENT	High	Low	2-Oct-24	1-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	10.10	9.60	9.90	9.66	86,100	852,390	-	49,920
Home Afrika Ltd Ord 1.00GEMS	0.35	0.31	0.34	0.34	35,800	12,172	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-

# KINGDOM SECURITIES

## Daily Market Wrap 2<sup>nd</sup> October 2024

Olympia Capital Holdings Ltd Ord 5.00	2.95	2.95	2.95	2.93	900	2,655	-	-
Trans-Century Plc Ord 0.50AIMS	0.43	0.40	0.42	0.40	119,900	50,358	-	-
<b>INVESTMENT SERVICES</b>	<b>High</b>	<b>Low</b>	<b>2-Oct-24</b>	<b>1-Oct-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Nairobi Securities Exchange Plc Ord 4.00	6.08	6.00	6.06	6.18	4,500	27,270	-	-
<b>MANUFACTURING &amp; ALLIED</b>	<b>High</b>	<b>Low</b>	<b>2-Oct-24</b>	<b>1-Oct-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	344.00	347.00	346.25	700	242,900	103,500	-
Carbacid Investments Plc Ord 1.00	22.80	22.50	22.60	22.30	7,100	160,460	-	-
East African Breweries Plc Ord 2.00	155.00	150.00	155.00	151.50	68,700	10,648,500	10,581,500	10,261,000
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.14	1.10	1.10	1.04	2,500	2,750	-	-
Kenya Orchards Ltd Ord 5.00AIMS	27.50	27.50	27.50	25.00	100	2,750	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	-	-	16.50	16.50	-	-	-	-
<b>TELECOMMUNICATION</b>	<b>High</b>	<b>Low</b>	<b>2-Oct-24</b>	<b>1-Oct-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Safaricom Plc Ord 0.05	15.10	14.90	15.00	15.00	26,384,900	395,773,500	302,043,235	131,110,500
<b>REAL ESTATE INVESTMENT TRUST</b>	<b>High</b>	<b>Low</b>	<b>2-Oct-24</b>	<b>1-Oct-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	-	-	-	-
<b>EXCHANGE TRADED FUNDS</b>	<b>High</b>	<b>Low</b>	<b>2-Oct-24</b>	<b>1-Oct-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	-	-	-	-

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