

Daily Market Wrap

- Stock prices rose faster on Tuesday, 8th October at 0.6% to recover the losses recorded on Monday, 7th October 2024. All price tracking indices went up led by NSE 10 and NSE 20 which gained 1.1% each followed by NSE 25 at 0.9% and NASI at 0.6%
- Volumes traded dipped 36.6% from 12.20Mn to 7.77Mn shares pulling the value traded 37.2% to KES 97.05Mn.
- Foreign activity declined to 29.8% with a net foreign inflow of KES 39.91Mn compared to an average foreign activity of 32.9% recorded on Monday of KES 65.30Mn net foreign outflows.
- EABL emerged the day's top mover with KES 37.88Mn from 218,000 shares. KCB Group came second with KES 13.08Mn as its price rose 0.4% from KES 35.30 to KES 35.45 per share. EABL's share price surged 6.8% from KES 162.75 to KES 173.745 on what appears to be reactions to the brewer's plan to reward its executives shares worth KES 125Mn after the successful Diageo acquisition of EABL shares that happened in 2023.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,159.17	1,146.89	1.1%
N20 Share Index	1,791.28	1,772.23	1.1%
NSE 25 Share Index	2,972.35	2,946.06	0.9%
NASI	108.81	108.20	0.6%
Mkt Capitalization(Bn)	1,703.27	1,693.75	0.6%
Volumes Traded (Mn)	7.77	12.20	-36.3%
Equities Turnover (Mn)	97.05	154.54	-37.2%
Bonds Turnover(Mn)	4,395.05	2,854.15	54.0%
DAY'S TOP MOVERS			
Turnovers (KES Mn)	Price	Av. Foreign %	
EABL	37.88	173.75	47.1%
KCB Group	13.08	35.45	0.0%
Equity Group	8.97	45.45	59.0%
Kenya Power	7.11	3.19	4.8%
Safaricom	6.30	14.90	

Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	29.8%	32.9%	
Foreign Buys %	50.3%	11.9%	
Foreign Buys (KES Mn)	49.04	18.37	62.6%
Foreign Buys (USD Mn)	0.38	0.14	62.6%
Top Foreign Buys (KES Mn)			
	Foreign Buy		%Δ
EABL	0.22	35.69	94.3%
Equity Group	0.20	8.76	97.6%
Safaricom	0.42	3.09	49.0%
Jubilee	0.00	0.71	87.7%

Derivatives Market			
Transaction	Current	Previous	% Change
Contracts	190	34	-
Open contracts	371	391	-5.1%
Total Value	3,775,900	1,536,670	-

Top Gainers List			
Counter	8-Oct-24	7-Oct-24	%Δ
Kenya Orchards	40.05	36.45	9.9%
NMG	15.85	14.60	8.6%
EABL	173.75	162.75	6.8%
Eveready	1.17	1.11	5.4%
Kenya Power	3.19	3.05	4.6%

Top Losers Chart			
Counter	8-Oct-24	7-Oct-24	%Δ
Xpress	3.15	3.49	-9.7%
Car-General	19.20	20.85	-7.9%
NSE	5.64	5.94	-5.1%
NCBA Group	42.20	44.00	-4.1%
NBV	2.12	2.20	-3.6%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	39.91	-65.30	-161.1%
Foreign Sales %	9.4%	54.0%	
Foreign Sales (KES Mn)	9.13	83.67	816.3%
Foreign Sales (USD Mn)	0.07	0.65	816.3%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Kenya Re	2.51	2.93	98.7%
BAT	0.01	2.90	100.0%
Equity Group	0.20	1.83	20.4%
Jubilee	0.00	0.63	77.5%

Currency Performance			
	8-Oct-24	7-Oct-24	%Δ
KES/USD	129.1955	129.1947	0.0%
G15 KES/GBP	169.1621	169.4066	0.0%
KES/EUR	141.9019	141.6684	-0.2%
KES/JPY	87.3444	87.0027	-0.4%

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Find below equities pricelist

AGRICULTURAL	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	-	-	10.80	10.80	-	-	-	-
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	17.75	17.60	17.70	17.00	2,500	44,250	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	218.00	217.75	218.00	217.75	2,200	479,600	43,600	-
AUTOMOBILES & ACCESSORIES	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	19.50	19.00	19.20	20.85	5,100	97,920	-	97,900
BANKING	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	14.20	14.10	14.15	14.10	30,200	427,330	-	-
BK Group Plc Ord 0.80	35.00	35.00	35.00	33.50	100	3,500	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	50.00	49.50	49.65	50.00	22,400	1,112,160	-	108,900
Equity Group Holdings Plc Ord 0.50	45.90	45.00	45.45	44.80	197,400	8,971,830	8,758,345	1,829,420
HF Group Plc Ord 5.00	4.15	3.90	3.99	4.01	55,900	223,041	-	-
I&M Group Plc Ord 1.00	23.90	23.45	23.55	23.55	23,400	551,070	-	2,390
KCB Group Plc Ord 1.00	35.85	35.25	35.45	35.30	369,100	13,084,595	-	-
NCBA Group Plc Ord 5.00	44.50	41.75	42.20	44.00	91,900	3,878,180	-	-
Stanbic Holdings Plc ord.5.00	120.00	119.00	119.75	119.00	5,900	706,525	-	-
Standard Chartered Bank Kenya Ltd Ord 5.00	216.00	213.00	214.00	212.00	5,900	1,262,600	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	13.95	13.50	13.65	13.70	72,900	995,085	-	-
COMMERCIAL AND SERVICES	High	Low	8-Oct-24	7-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	1.22	1.15	1.17	1.11	35,800	41,886	-	-
Express Kenya Plc Ord 5.00AIMS	3.15	3.15	3.15	3.49	700	2,205	-	2,205
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	2.59	2.35	2.43	2.36	300	729	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.20	2.00	2.12	2.20	500	1,060	-	-
Nation Media Group Plc Ord. 2.50	16.00	15.50	15.85	14.60	1,400	22,190	-	-
Sameer Africa Plc Ord 5.00	2.63	2.50	2.57	2.55	200	514	-	-
Standard Group Plc Ord 5.00	6.00	5.54	5.60	5.52	1,700	9,520	-	-
TPS Eastern Africa Ltd Ord 1.00	15.00	13.50	14.50	15.00	300	4,350	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.17	0.18	0.18	36,500	6,570	-	-
WPP Scangroup Plc Ord 1.00	2.37	2.27	2.31	2.36	3,200	7,392	-	-
CONSTRUCTION & ALLIED	High	Low	8-Oct-24	7-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	58.25	57.25	57.75	58.25	21,600	1,247,400	-	-
Crown Paints Kenya Plc Ord 5.00	30.00	30.00	30.00	29.50	1,000	30,000	-	-
E.A.Cables Ltd Ord 0.50	1.00	0.97	0.99	0.96	29,400	29,106	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	55.75	45.70	50.50	50.75	12,000	606,000	-	-
ENERGY & PETROLEUM	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	3.01	2.98	2.99	2.99	405,100	1,211,249	15,000	7,500
Kenya Power & Lighting Co Plc Ord 2.50	3.35	3.05	3.19	3.05	2,228,200	7,107,958	664,640	23,250
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	21.00	20.00	20.05	19.25	7,200	144,360	-	-
Umeme Ltd Ord 0.50	16.50	16.40	16.50	16.40	3,600	59,400	-	-
INSURANCE	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	6.00	5.80	5.98	5.90	36,400	217,672	-	-
CIC Insurance Group Ltd Ord.1.00	2.20	2.07	2.10	2.13	53,900	113,190	-	-
Jubilee Holdings Ltd Ord 5.00	165.00	164.50	164.75	164.25	4,900	807,275	708,850	626,350
Kenya Re Insurance Corporation Ltd Ord 2.50	1.29	1.17	1.18	1.18	2,505,400	2,956,372	240	2,929,709
Liberty Kenya Holdings Ltd Ord. 1.00	-	-	5.50	5.50	-	-	-	-
Sanlam Kenya Plc Ord 5.00	-	-	6.46	6.46	-	-	-	-
INVESTMENT	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	9.90	9.80	9.80	9.80	212,700	2,084,460	-	-
Home Afrika Ltd Ord 1.00GEMS	0.35	0.33	0.34	0.35	235,600	80,104	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	-	-	3.10	3.10	-	-	-	-
Trans-Century Plc Ord 0.50AIMS	0.42	0.39	0.40	0.40	246,200	98,480	-	-

INVESTMENT SERVICES	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	6.08	5.36	5.64	5.94	119,600	674,544	-	557,868
MANUFACTURING & ALLIED	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	79.00	79.00	79.00	79.00	700	55,300	-	-
British American Tobacco Kenya Plc Ord 10.00	350.00	349.00	349.25	350.00	8,300	2,898,775	70,000	2,898,600
Carbacid Investments Plc Ord 1.00	22.80	22.70	22.75	22.70	13,300	302,575	-	-
East African Breweries Plc Ord 2.00	179.00	154.50	173.75	162.75	218,000	37,877,500	35,688,875	-
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.10	1.00	1.06	1.10	13,100	13,886	-	-
Kenya Orchards Ltd Ord 5.00AIMS	40.05	40.05	40.05	36.45	1,000	40,050	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	16.50	15.00	16.45	16.50	2,100	34,545	-	-
TELECOMMUNICATION	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	15.00	14.85	14.90	14.95	423,000	6,302,700	3,091,750	45,000
REAL ESTATE INVESTMENT TRUST	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	2,390
EXCHANGE TRADED FUNDS	High	Low	8-Oct-24	7-Oct-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3205i	3205i	3,205.00	3,140.00	-	-	-	-

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Kingdom Securities Ltd – A subsidiary of Co-operative Bank Limited.
Co-operative Bank House- 5th Floor, P.O Box 48231 - 00100 Nairobi, Kenya
Office: 0711049540/0711049956
Email: info@kingdomsecurities.co.ke

Research Department

Shadrack Manyinsa +254 711 049 956

Sales Team

Edgar Martim +254 711 049 534
Alfred Too +254 711 049 330
Asena Moffat +254 711 049 663
Ashley Odundo +254 711 049
Gloria Ohito +254 711 049 993

Client Service and Operations

Joab Kiprono +254 711 049 528
Purity Malombe +254 711 049 729