

Daily Market Wrap,

- Stock prices were down 0.4% on Thursday, 26th Sept 2024 forcing all the indices to turn down. NASI, NSE 20 & NSE 25 all lost 0.4% each as NSE 10 lost the most at 0.6%.
- Market transactions however jumped 35.5% up from 9.94Mn to 13.49Mn shares, doubling the value traded 184.5% up from KES 106.23Mn to KES 302.22Mn. The rise in market activity was rallied by the banking sector which traded 7.75Mn shares of KES 276.40Mn
- BK Group was the day's top mover with a value of KES 183.94Mn from 5.49Mn shares, all of which were traded by foreigners. KCB Group came second with a KES 63.49Mn value as it's price fell marginally at 0.4% from KES 35.30 to KES 35.15 per share. Equity Group also lost 0.5% from KES 43.70 to KES 43.50 to emerge third on the top movers list.
- The East African Portland still rallied up p 10.0% from KES 24.00 to KES 26.40 per share on what remains to be speculative investing. This is even as the cement producer was urged to take advantage of the newly introduced Export and Investment promotion Levy to support local production of cement for export.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,123.54	1,129.76	-0.6%
NSE 20 Share Index	1,771.80	1,778.48	-0.4%
NSE 25 Share Index	2,904.16	2,916.46	-0.4%
NASI	107.11	107.49	-0.4%
Mkt Capitalization(Bn)	1,676.68	1,682.68	-0.4%
Volumes Traded (Mn)	13.48	9.95	35.5%
Equities Turnover (Mn)	302.22	106.23	184.5%
Bonds Turnover(Mn)	4,714.40	6,509.25	-27.6%

DAY'S TOP MOVERS			
	Turnovers (KES Mn)	Price	Av. Foreign %
BK Group	183.94	33.50	100.0%
KCB Group	63.49	35.15	6.2%
StanChart	18.66	203.50	0.0%
Kenya Power	11.36	3.44	0.0%
Safaricom	4.62	15.05	20.0%

Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	62.4%	53.4%	
Foreign Buys %	63.3%	53.4%	
Foreign Buys (KES Mn)	191.82	57.31	70.1%
Foreign Buys (USD Mn)	1.48	0.44	70.1%

Top Foreign Buys (KES Mn)			
	Volumes-Mn	Foreign Buy	%Δ
BK Group	5.49	183.92	100.0%
KCB Group	1.81	7.85	12.4%
Safaricom	0.31	0.05	1.0%
Sasini	0.01	0.00	3.8%
Absa (K)	0.05	-	0.0%

Derivatives Market			
Transaction	Current	Previous	% Change
Contracts	4	72	-94.4%
Open contracts	335	333	0.6%
Total Value	140,000	1,370,000	-89.78%

Top Gainers List			
Counter	26-Sep-24	25-Sep-24	%Δ
Absa New Gold	3,210.00	2,860.00	12.2%
Car-General	23.10	21.00	10.0%
Portland cement	26.40	24.00	10.0%
Flame tree	1.12	1.04	7.7%
Eveready	1.08	1.01	6.9%

Top Losers Chart			
Counter	26-Sep-24	25-Sep-24	%Δ
Standard Group	5.60	6.22	-10.0%
NMG	15.20	16.10	-5.6%
EABL	154.50	160.00	-3.4%
Carbacid	22.10	22.85	-3.3%
Home Africa	0.31	0.32	-3.1%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	5.56	-0.01	-54018.3%
Foreign Sales %	61.5%	53.4%	
Foreign Sales (KES Mn)	186.26	57.32	-69.2%
Foreign Sales (USD Mn)	1.44	0.44	-69.2%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
BK Group	5.49	183.79	99.9%
Safaricom	0.31	1.80	39.0%
EABL	0.01	0.59	28.5%
Equity Group	0.07	0.07	2.6%

Currency Performance			
	26-Sep-24	25-Sep-24	%Δ
KES/USD	129.1942	129.1863	0.0%
G15 KES/GBP	172.6228	173.2840	0.0%
KES/EUR	144.1743	144.6305	0.3%
KES/JPY	89.4604	90.1415	0.8%

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Equities Pricelist

	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
AGRICULTURAL								
Eaagads Ltd Ord 1.25 AIMS	-	-	11.50	11.50	-	-	-	-
Kakuzi Plc Ord.5.00	-	-	400.50	400.50	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	245.00	243.00	244.50	243.00	700	171,150	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	365.00	365.00	-	-	-	-
Sasini Plc Ord 1.00	17.00	16.95	17.00	17.50	5,300	90,100	3,390	-
Williamson Tea Kenya Plc Ord 5.00AIMS	219.00	218.00	218.00	218.25	3,400	741,200	-	-
AUTOMOBILES & ACCESSORIES								
Car & General (K) Ltd Ord 5.00	23.10	23.10	23.10	21.00	2,000	46,200	-	-
BANKING								
ABSA Bank Kenya Plc Ord 0.50	14.30	13.90	14.15	14.15	49,000	693,350	-	-
BK Group Plc Ord 0.80	33.50	33.50	33.50	33.50	5,490,600	183,935,100	183,918,350	183,791,050
Diamond Trust Bank Kenya Ltd Ord 4.00	50.00	49.00	49.50	49.10	61,600	3,049,200	-	-
Equity Group Holdings Plc Ord 0.50	43.95	43.00	43.50	43.70	66,700	2,901,450	-	74,715
HF Group Plc Ord 5.00	4.38	4.27	4.33	4.33	40,400	174,932	-	-
I&M Group Plc Ord 1.00	23.80	23.50	23.60	23.70	40,700	960,520	-	-
KCB Group Plc Ord 1.00	35.50	35.00	35.15	35.30	1,806,300	63,491,445	7,854,200	-
NCBA Group Plc Ord 5.00	43.50	42.00	42.15	41.55	31,700	1,336,155	-	-
Stanbic Holdings Plc ord.5.00	123.00	121.00	122.25	121.00	1,800	220,050	-	-
Standard Chartered Bank Kenya Ltd Ord 5.00	210.00	203.00	203.50	204.75	91,700	18,660,950	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	13.60	13.20	13.30	13.15	73,700	980,210	-	-
COMMERCIAL AND SERVICES								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.09	1.01	1.08	1.01	3,200	3,456	-	-
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	600	1,560	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.10	1.92	1.97	1.91	5,600	11,032	-	-
Nation Media Group Plc Ord. 2.50	15.20	15.05	15.20	16.10	12,100	183,920	-	-
Sameer Africa Plc Ord 5.00	2.56	2.56	2.56	2.51	200	512	-	-
Standard Group Plc Ord 5.00	5.60	5.60	5.60	6.22	3,600	20,160	-	-
TPS Eastern Africa Ltd Ord 1.00	13.55	12.20	12.85	12.35	10,400	133,640	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.17	0.18	0.18	88,100	15,858	-	-
WPP Scangroup Plc Ord 1.00	2.30	2.13	2.30	2.34	201,500	463,450	-	-
CONSTRUCTION & ALLIED								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	59.00	56.50	57.25	58.50	17,200	984,700	-	-
Crown Paints Kenya Plc Ord 5.00	30.25	30.25	30.25	30.00	100	3,025	-	-
E.A.Cables Ltd Ord 0.50	0.97	0.96	0.97	0.91	11,500	11,155	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	26.40	26.40	26.40	24.00	1,200	31,680	-	-
ENERGY & PETROLEUM								
KenGen Co. Plc Ord. 2.50	3.10	2.95	3.01	3.01	368,700	1,109,787	-	-
Kenya Power & Lighting Co Plc Ord 2.50	3.49	3.31	3.44	3.47	3,303,300	11,363,352	-	-
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	20.50	20.00	20.40	19.95	600	12,240	-	-
Umeme Ltd Ord 0.50	16.50	16.00	16.25	16.35	3,400	55,250	-	8,000
INSURANCE								
Britam Holdings Plc Ord 0.10	6.06	5.90	6.00	5.94	5,600	33,600	-	-
CIC Insurance Group Ltd Ord.1.00	2.14	2.01	2.10	2.06	180,700	379,470	-	-
Jubilee Holdings Ltd Ord 5.00	172.00	172.00	172.00	172.50	600	103,200	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.30	1.28	1.29	1.28	832,600	1,074,054	-	7,020
Liberty Kenya Holdings Ltd Ord. 1.00	5.76	5.20	5.36	5.50	3,600	19,296	-	-
Sanlam Kenya Plc Ord 5.00	6.54	6.50	6.54	6.56	1,700	11,118	-	-
INVESTMENT								
Centum Investment Co Plc Ord 0.50	9.32	8.98	9.00	9.02	50,300	452,700	-	-
Home Afrika Ltd Ord 1.00GEMS	0.35	0.29	0.31	0.32	57,300	17,763	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	-	-	2.91	2.91	-	-	-	-
Trans-Century Plc Ord 0.50AIMS	0.47	0.44	0.45	0.44	141,500	63,675	-	-
INVESTMENT SERVICES								
	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales

KINGDOM SECURITIES

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26th September 2024

Nairobi Securities Exchange Plc Ord 4.00	6.00	5.80	5.90	5.84	46,800	276,120	-	-
MANUFACTURING & ALLIED	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	79.00	79.00	79.00	79.00	1,100	86,900	-	-
British American Tobacco Kenya Plc Ord 10.00	350.00	348.00	349.50	349.75	600	209,700	-	-
Carbacid Investments Plc Ord 1.00	22.90	22.00	22.10	22.85	32,300	713,830	-	-
East African Breweries Plc Ord 2.00	158.00	152.00	154.50	160.00	13,300	2,054,850	-	585,200
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.14	1.10	1.12	1.04	1,800	2,016	-	-
Kenya Orchards Ltd Ord 5.00AIMS	-	-	19.00	19.00	-	-	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	17.15	16.90	16.95	16.90	5,500	93,225	-	-
TELECOMMUNICATION	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	15.10	15.00	15.05	15.10	306,900	4,618,845	45,150	1,797,750
REAL ESTATE INVESTMENT TRUST	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	-
EXCHANGE TRADED FUNDS	High	Low	26-Sep-24	25-Sep-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3210i	3210i	3,210.00	2,860.00	-	-	-	-

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