

### Daily Market Wrap

- Equities prices traded high on the first trading day of December 2024, gaining 1.1% on a general rise in prices especially in the low capitalization counters. NSE 10 rose 0.9% followed NSE 25 at 0.8% while NSE 10 gained the lowest at 0.3%.
- Market foreign activity dropped minimally from 71.4% on Friday, 29<sup>th</sup> November to 68.2% by close of the first 2<sup>nd</sup> December 2024 with a net foreign outflow of KES 31.37MN from a foreign inflow of KES 21.24MN recorded the previous trading day.
- Safaricom emerged the day's top mover with a total turnover of KES 200.18MN from 13.04MN shares as its price went up 2.3% from KES 15.00 to KES 15.35 per share. The counter still experienced high foreign outflows of KES 40.37MN after recording an average foreign sale of 99.0% of all its sales compared to a foreign buy of 78.8%.
- The banking sector followed with KES 74.47MN of 2.47MN shares, led by Equity Group which recorded KES 28.85MN value from 640,300 shares. Equity Group's share price remained relatively stable at KES 45.05 per share in relation to KES 45.00 traded last Friday.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,180.82	1,170.10	0.9%
N20 Share Index	1,866.73	1,861.35	0.3%
NSE 25 Share Index	3,088.21	3,063.32	0.8%
NASI	112.74	111.53	1.1%
Mkt Capitalization(Bn)	1,764.83	1,745.88	1.1%
Volumes Traded (Mn)	22.56	15.83	42.5%
Equities Turnover (Mn)	296.97	336.45	-11.7%
Bonds Turnover(Mn)	5,676.20	2,263.00	150.8%

DAY's TOP MOVERS	Turnovers (KES Mn)	Price	Av. Foreign %
Safaricom	200.18	15.35	88.9%
Equity Group	28.85	45.05	87.8%
Co-op Bank	14.67	13.85	0.0%
BTBK	11.90	54.25	0.7%
Kenya Power	10.14	4.45	

Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	68.2%	71.4%	
Foreign Buys %	63.1%	74.5%	
Foreign Buys (KES Mn)	193.15	252.09	-30.5%
Foreign Buys (USD Mn)	1.49	1.94	-30.5%

Top Foreign Buys (KES Mn)			
Counter	Foreign Buy	%Δ	
Safaricom	13.04	157.78	78.8%
Equity Group	0.64	27.00	93.6%
Kenya Power	2.28	5.03	49.6%
Kengen	1.76	1.71	28.8%
Kenya Re	2.65	1.14	37.5%

Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	2	97	-97.9%
Open contracts	389	387	0.5%
Total Value	30,900	2,070,600	-98.51%

Top Gainers List			
Counter	2-Dec-24	29-Nov-24	%Δ
Olympia capital	3.20	2.93	9.2%
Crown Paints	35.00	32.10	9.0%
Scan-Group	2.18	2.02	7.9%
Sameer	2.58	2.42	6.6%
Standard Group	5.00	4.70	6.4%

Top Losers Chart			
Counter	2-Dec-24	29-Nov-24	%Δ
NBV	2.00	2.09	-4.3%
Williamson	211.00	220.00	-4.1%
Umeme	16.05	16.60	-3.3%
Eveready	1.05	1.08	-2.8%
Kengen	3.37	3.46	-2.6%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-31.37	21.24	-247.7%
Foreign Sales %	73.3%	68.2%	
Foreign Sales (KES Mn)	224.52	230.84	2.8%
Foreign Sales (USD Mn)	1.73	1.78	2.8%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	13.04	198.14	99.0%
Equity Group	0.64	23.63	82.0%
Kenya Re	2.65	1.34	44.1%
StanChart	0.01	0.50	25.4%
Stanbic	0.00	0.29	95.7%

Currency Performance			
	2-Dec-24	29-Nov-24	%Δ
KES/USD	129.7568	129.6754	-0.1%
KES/GBP	164.6549	164.8239	0.0%
KES/EUR	136.5561	137.0928	0.4%
KES/JPY	86.1256	86.3783	0.3%

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Find below price movement:

Equities Pricelist								
	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
<b>AGRICULTURAL</b>								
Eaagads Ltd Ord 1.25 AIMS	12.00	12.00	12.00	12.00	200	2,400	-	-
Kakuzi Plc Ord.5.00	-	-	397.00	397.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	235.00	235.00	235.00	230.00	100	23,500	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	365.00	365.00	-	-	-	-
Sasini Plc Ord 1.00	15.00	14.50	14.55	14.40	7,700	112,035	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	212.00	210.00	211.00	220.00	2,200	464,200	-	-
<b>AUTOMOBILES &amp; ACCESSORIES</b>								
Car & General (K) Ltd Ord 5.00	-	-	21.05	21.05	-	-	-	-
<b>BANKING</b>								
ABSA Bank Kenya Plc Ord 0.50	15.25	14.60	14.95	14.95	27,500	411,125	-	-
BK Group Plc Ord 0.80	33.85	33.85	33.85	33.85	100	3,385	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	55.00	54.00	54.25	53.50	219,300	11,897,025	-	175,200
Equity Group Holdings Plc Ord 0.50	46.00	45.00	45.05	45.00	640,300	28,845,515	27,000,000	23,628,400
HF Group Plc Ord 5.00	4.10	4.00	4.09	4.00	23,700	96,933	-	-
I&M Group Plc Ord 1.00	30.50	30.10	30.45	30.10	308,300	9,387,735	-	-
KCB Group Plc Ord 1.00	38.50	37.75	38.00	38.40	161,100	6,121,800	-	-
NCBA Group Plc Ord 5.00	42.50	42.00	42.05	43.15	18,300	769,515	-	-
Stanbic Holdings Plc ord.5.00	130.00	128.00	130.00	130.00	2,300	299,000	-	286,000
Standard Chartered Bank Kenya Ltd Ord 5.00	250.00	243.00	248.75	243.25	7,900	1,965,125	498,000	498,500
The Co-operative Bank of Kenya Ltd Ord 1.00	14.00	13.80	13.85	13.80	1,059,300	14,671,305	-	-
<b>COMMERCIAL AND SERVICES</b>								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.05	1.05	1.05	1.08	1,100	1,155	-	-
Express Kenya Plc Ord 5.00AIMS	3.43	3.43	3.43	3.44	200	686	-	-
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	2.30	2.30	2.30	2.30	9,300	21,390	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.02	2.00	2.00	2.09	27,400	54,800	-	40,800
Nation Media Group Plc Ord. 2.50	13.00	12.00	12.10	11.95	8,700	105,270	-	-
Sameer Africa Plc Ord 5.00	2.58	2.58	2.58	2.42	500	1,290	-	-
Standard Group Plc Ord 5.00	5.10	5.00	5.00	4.70	8,900	44,500	-	29,500
TPS Eastern Africa Ltd Ord 1.00	14.50	14.40	14.40	14.20	11,600	167,040	-	-
Uchumi Supermarket Plc Ord 5.00	0.22	0.20	0.21	0.21	4,800	1,008	-	-
WPP Scangroup Plc Ord 1.00	2.20	2.05	2.18	2.02	1,900	4,142	-	-
<b>CONSTRUCTION &amp; ALLIED</b>								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	63.00	62.00	62.75	63.25	2,000	125,500	-	-
Crown Paints Kenya Plc Ord 5.00	35.00	35.00	35.00	32.10	2,400	84,000	-	-
E.A.Cables Ltd Ord 0.50	1.10	0.98	1.06	1.01	12,800	13,568	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	35.00	35.00	35.00	33.40	400	14,000	-	-
<b>ENERGY &amp; PETROLEUM</b>								
KenGen Co. Plc Ord. 2.50	3.45	3.30	3.37	3.46	1,760,400	5,932,548	1,705,657	-
Kenya Power & Lighting Co Plc Ord 2.50	4.60	4.38	4.45	4.53	2,277,900	10,136,655	5,031,402	-
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	-	-	20.80	20.80	-	-	-	-
Umeme Ltd Ord 0.50	16.60	16.00	16.05	16.60	5,700	91,485	-	-
<b>INSURANCE</b>								
Britam Holdings Plc Ord 0.10	6.00	5.86	5.94	5.98	2,300	13,662	-	-
CIC Insurance Group Ltd Ord.1.00	2.10	2.06	2.10	2.04	72,400	152,040	-	-
Jubilee Holdings Ltd Ord 5.00	-	-	172.00	172.00	-	-	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.15	1.13	1.14	1.14	2,653,600	3,025,104	1,140,000	1,338,600
Liberty Kenya Holdings Ltd Ord. 1.00	-	-	7.12	7.12	-	-	-	-
Sanlam Kenya Plc Ord 5.00	4.52	4.47	4.51	4.52	1,600	7,216	-	-

INVESTMENT	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	10.00	9.62	9.70	9.64	7,000	67,900	-	-
Home Afrika Ltd Ord 1.00GEMS	0.37	0.34	0.35	0.35	81,800	28,630	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.20	3.20	3.20	2.93	600	1,920	-	-
Trans-Century Plc Ord 0.50AIMS	0.41	0.39	0.40	0.40	35,300	14,120	-	-
INVESTMENT SERVICES	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	6.00	5.74	5.84	5.96	14,200	82,928	-	-
MANUFACTURING & ALLIED	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	-	-	89.00	89.00	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	350.00	349.00	349.75	350.00	1,600	559,600	-	-
Carbacid Investments Plc Ord 1.00	18.00	17.30	17.60	17.90	8,200	144,320	-	-
East African Breweries Plc Ord 2.00	177.00	170.00	173.25	165.75	3,200	554,400	-	279,000
Flame Tree Group Holdings Ltd Ord 0.825GEMS	0.99	0.95	0.95	0.92	11,700	11,115	-	-
Kenya Orchards Ltd Ord 5.00AIMS	-	-	70.00	70.00	-	-	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	16.00	16.00	16.00	16.00	6,200	99,200	-	99,200
TELECOMMUNICATION	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	15.80	15.15	15.35	15.00	13,041,100	200,180,885	157,775,075	198,144,090
REAL ESTATE INVESTMENT TRUST	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	-
EXCHANGE TRADED FUNDS	High	Low	2-Dec-24	29-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3220i	3220i	3,220.00	3,220.00	-	-	-	-

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**Co-operative Bank House- 5th Floor, P.O Box 48231 - 00100 Nairobi, Kenya**

**Office: 0711049540/0711049956**

**Email: [info@kingdomsecurities.co.ke](mailto: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**