

### Daily Market Wrap

- Equities prices maintained a downward trend, shedding 0.8% on Tuesday, November 26, 2024, from those trade on Monday, occasioned by heavy foreign exits to developed markets especially to the USA after a successful poll held earlier this month. NSE 10 lost 0.9%, followed by NSE 25 at a 0.7% loss while NSE 20 gained marginally at 0.1%.
- Market foreign activity dropped from 85.0% on Monday to 81.8% on Tuesday, November 26, 2024. Net foreign outflows tripled from KES 10.12Mn to KES 30.70Mn on heavy foreign sales.
- Market activity, however, improved 29.5% from 23.73Mn to 30.72Mn shares, pushing the value traded 66.7% higher to KES 419.13Mn from KES 251.40Mn traded the day before.
- The Banking sector rallied the market with KES 224.69Mn of 5.15Mn shares led by Equity Group which emerged the day's top mover with KES 171.94Mn value from 3.856MMn shares. Stanbic and KCB Group took third and fourth market mover positions Immediately after Safaricom, see below table.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,180.20	1,190.55	-0.9%
N20 Share Index	1,885.31	1,884.30	0.1%
NSE 25 Share Index	3,074.30	3,094.61	-0.7%
NASI	111.38	112.26	-0.8%
Mkt Capitalization(Bn)	1,743.54	1,757.25	-0.8%
Volumes Traded (Mn)	30.72	23.73	29.5%
Equities Turnover (Mn)	419.13	251.40	66.7%
Bonds Turnover(Mn)	7,342.50	8,678.50	-15.4%
DAY's TOP MOVERS			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
Equity Group	171.94	44.50	88.5%
Safaricom	171.38	14.65	94.6%
Stanbic	28.77	127.25	93.8%
KCB Group	13.14	38.10	0.0%
Kenya Re	6.48	1.15	
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	81.8%	85.0%	
Foreign Buys %	78.2%	83.5%	
Foreign Buys (KES Mn)	329.09	295.52	10.2%
Foreign Buys (USD Mn)	2.54	2.28	10.1%
Top Foreign Buys (KES Mn)			
Counter	Foreign Buy	%Δ	
Safaricom	11.70	156.51	91.2%
Equity Group	3.86	142.95	83.1%
Stanbic	0.23	28.59	99.4%
Kenya Power	0.63	0.61	22.1%
Kenya Re	5.64	0.27	4.1%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	12	16	-25.0%
Open contracts	318	319	-0.3%
Total Value	439,400	646,500	-32.03%

Top Gainers List			
Counter	26-Nov-24	25-Nov-24	%Δ
Sanlam Kenya	4.96	4.51	10.0%
Sameer	2.44	2.27	7.5%
NCBA Group	43.05	40.45	6.4%
Olympia capital	3.15	2.99	5.4%
Britam	6.00	5.70	5.3%

Top Losers Chart			
Counter	26-Nov-24	25-Nov-24	%Δ
Eaagad	12.00	13.25	-9.4%
NBV	2.10	2.17	-3.2%
KCB Group	38.10	39.20	-2.8%
Umeme	16.05	16.50	-2.7%
Trans-Century	0.41	0.42	-2.4%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-30.70	-10.12	203.3%
Foreign Sales %	85.5%	86.4%	
Foreign Sales (KES Mn)	359.79	305.64	-15.1%
Foreign Sales (USD Mn)	2.78	2.36	-15.0%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	11.70	168.00	97.9%
Equity Group	3.86	161.59	93.9%
Stanbic	0.23	25.40	88.3%
Kenya Re	5.64	4.42	68.4%
Unga Group	0.01	0.15	95.2%

Currency Performance			
	26-Nov-24	25-Nov-24	%Δ
KES/USD	129.5736	129.4946	-0.1%
KES/GBP	162.5824	164.2639	0.0%
KES/EUR	135.7283	137.1154	1.0%
KES/JPY	84.3166	83.4910	-1.0%

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### Equities Pricelist

AGRICULTURAL	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	12.00	12.00	12.00	13.25	400	4,800	-	-
Kakuzi Plc Ord 5.00	-	-	397.00	397.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	-	-	231.50	231.50	-	-	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	365.00	365.00	-	-	-	-
Sasini Plc Ord 1.00	15.95	15.15	15.30	15.60	19,500	298,350	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	212.25	212.00	212.25	212.25	200	42,450	-	-
AUTOMOBILES & ACCESSORIES	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	21.05	21.05	21.05	21.05	900	18,945	-	-
BANKING	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	15.50	14.90	15.10	15.30	55,500	838,050	1,490	-
BK Group Plc Ord 0.80	33.80	33.80	33.80	33.90	2,900	98,020	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	53.00	53.00	53.00	52.50	600	31,800	-	-
Equity Group Holdings Plc Ord 0.50	45.55	44.00	44.50	45.55	3,863,900	171,943,550	142,953,370	161,585,970
HF Group Plc Ord 5.00	4.10	3.80	3.93	3.92	168,300	661,419	-	-
I&M Group Plc Ord 1.00	30.50	29.50	30.00	30.10	67,500	2,025,000	15,000	-
KCB Group Plc Ord 1.00	39.60	38.00	38.10	39.20	344,800	13,136,880	-	-
NCBA Group Plc Ord 5.00	44.00	41.05	43.05	40.45	16,900	727,545	-	-
Stanbic Holdings Plc ord 5.00	129.00	127.00	127.25	127.75	226,100	28,771,225	28,586,100	25,400,000
Standard Chartered Bank Kenya Ltd Ord 5.00	245.00	241.00	241.25	241.00	3,800	916,750	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	14.05	13.60	13.90	14.00	398,200	5,534,980	-	-
COMMERCIAL AND SERVICES	High	Low	26-Nov-24	25-Nov-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	1.10	1.07	1.08	1.10	5,800	6,264	-	-
Express Kenya Plc Ord 5.00AIMS	-	-	3.44	3.44	-	-	-	-
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	2.10	2.10	2.10	2.10	100	210	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.10	2.10	2.10	2.17	10,200	21,420	-	21,420
Nation Media Group Plc Ord. 2.50	12.45	12.00	12.20	12.25	40,800	497,760	-	6,225
Sameer Africa Plc Ord 5.00	2.45	2.35	2.44	2.27	4,000	9,760	-	-
Standard Group Plc Ord 5.00	5.18	5.00	5.06	5.18	600	3,036	-	-
TPS Eastern Africa Ltd Ord 1.00	13.60	13.50	13.50	13.80	5,700	76,950	-	-
Uchumi Supermarket Plc Ord 5.00	0.19	0.19	0.19	0.19	5,700	1,083	-	-
WPP Scangroup Plc Ord 1.00	2.25	2.10	2.15	2.05	5,900	12,685	-	-
CONSTRUCTION & ALLIED	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	65.00	63.50	64.00	65.00	6,200	396,800	-	-
Crown Paints Kenya Plc Ord 5.00	32.45	32.45	32.45	32.45	200	6,490	-	-
E.A.Cables Ltd Ord 0.50	1.10	1.00	1.05	1.02	13,100	13,755	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	37.35	35.00	36.60	37.35	12,600	461,160	-	-
ENERGY & PETROLEUM	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	4.19	4.00	4.03	4.03	1,486,200	5,989,386	94,000	-
Kenya Power & Lighting Co Plc Ord 2.50	4.49	4.29	4.37	4.30	634,000	2,770,580	611,180	-
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	-	-	20.00	20.00	-	-	-	-
Umeme Ltd Ord 0.50	16.75	15.90	16.05	16.50	26,500	425,325	-	-
INSURANCE	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	6.12	5.90	6.00	5.70	62,900	377,400	-	-
CIC Insurance Group Ltd Ord 1.00	2.20	2.18	2.19	2.20	13,200	28,908	-	17,160
Jubilee Holdings Ltd Ord 5.00	172.00	172.00	172.00	170.00	700	120,400	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.17	1.11	1.15	1.15	5,636,900	6,482,435	267,843	4,417,725
Liberty Kenya Holdings Ltd Ord. 1.00	7.70	7.70	7.70	7.70	300	2,310	-	-
Sanlam Kenya Plc Ord 5.00	4.96	4.95	4.96	4.51	1,900	9,424	-	-
INVESTMENT	High	Low	26-Nov-24	25-Nov-24	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	9.72	9.64	9.68	9.64	39,900	386,232	-	16,388
Home Afrika Ltd Ord 1.00GEMS	0.37	0.34	0.34	0.34	180,900	61,506	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.15	3.15	3.15	2.99	100	315	-	-
Trans-Century Plc Ord 0.50AIMS	0.42	0.40	0.41	0.42	153,900	63,099	-	-

<b>INVESTMENT SERVICES</b>	<b>High</b>	<b>Low</b>	<b>26-Nov-24</b>	<b>25-Nov-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Nairobi Securities Exchange Plc Ord 4.00	5.80	5.70	5.72	5.74	9,400	53,768	-	46,900
<b>MANUFACTURING &amp; ALLIED</b>	<b>High</b>	<b>Low</b>	<b>26-Nov-24</b>	<b>25-Nov-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	89.00	89.00	89.00	89.00	300	26,700	-	-
British American Tobacco Kenya Plc Ord 10.00	352.00	350.00	350.75	351.25	600	210,450	-	-
Carbacid Investments Plc Ord 1.00	20.95	20.00	20.45	20.05	167,700	3,429,465	-	-
East African Breweries Plc Ord 2.00	180.00	177.00	179.50	180.00	1,000	179,500	35,900	125,950
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.00	0.85	0.89	0.91	97,300	86,597	-	-
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	17.40	14.80	15.95	15.90	10,100	161,095	1,600	153,600
<b>TELECOMMUNICATION</b>	<b>High</b>	<b>Low</b>	<b>26-Nov-24</b>	<b>25-Nov-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
Safaricom Plc Ord 0.05	14.85	14.55	14.65	14.85	11,698,000	171,375,700	156,509,745	167,999,555
<b>REAL ESTATE INVESTMENT TRUST</b>	<b>High</b>	<b>Low</b>	<b>26-Nov-24</b>	<b>25-Nov-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	-	-	15,000	-
<b>EXCHANGE TRADED FUNDS</b>	<b>High</b>	<b>Low</b>	<b>26-Nov-24</b>	<b>25-Nov-24</b>	<b>Volume</b>	<b>Value Traded</b>	<b>Foreign Buys</b>	<b>Foreign Sales</b>
ABSA New Gold ETF	-	-	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