

Daily Market Wrap

- Stock prices further went up 0.2% overall on Tuesday, 21st January 2025 on gains from the medium and low capitalization counters.
- Market activity improved 34.5% from 19.04Mn to 25.11Mn, to double the value traded from KES 210.02Mn to KES 432.18Mn. This was mainly supported by heavy local trade which saw foreign activity drop from 26.8% to 23.7%.
- The banking sector gained a further 0.7%, helped by faster price rises in HF Group and I&M, which were up 5.1% and 2.1% to KES 9.42 and to KES 33.30 per share respectfully. This is even as market attention shifted to Safaricom which moved 12.29Mn shares of KES 233.43Mn to emerge the day's top mover. The giant telco's price gained an additional 0.5% from KES 18.90 to KES 19.00 per share despite its low foreign participation of 27.7%.
- KCB Group and Equity Group gained 1.2% and 0.6% to KES 43.60 and to KES 48.75 per share respectfully. This saw KCB Group take the top second mover position with KES 41.0Mn as Equity Group closed the top fiver movers' list with KES 22.76Mn value.
- The secondary bonds market remained active to trade KES 9.13Bn value from 158 transactions, a 3.7% and 189.7% decline in value and deals traded. This is even as investors rush to take positions ahead of an expected acceleration in the sector's returns as interest rates come down.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,345.21	1,340.44	0.4%
N20 Share Index	2,169.42	2,170.89	-0.1%
NSE 25 Share Index	3,507.54	3,491.94	0.4%
NASI	131.83	131.53	0.2%
Mkt Capitalization(Bn)	2,070.90	2,066.11	0.2%
Volumes Traded (Mn)	25.60	19.04	34.5%
Equities Turnover (Mn)	432.18	210.02	105.8%
Bonds Turnover(Mn)	9,128.05	9,480.75	-3.7%
DAY's TOP MOVERS			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
Safaricom	233.42	19.00	27.7%
KCB Group	41.05	43.60	0.6%
EABL	25.11	183.00	24.4%
Stanbic	24.80	142.75	60.3%
Equity Group	22.76	48.75	
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	23.7%	26.8%	
Foreign Buys %	30.6%	18.3%	
Foreign Buys (KES Mn)	132.87	39.28	70.4%
Foreign Buys (USD Mn)	1.03	0.30	70.4%
Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	12.29	89.60	38.4%
Equity Group	0.47	20.73	91.1%
EABL	0.14	8.49	33.8%
Stanbic	0.17	7.18	28.9%
StanChart	0.06	6.50	38.6%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	11	16	-31.3%
Open contracts	331	331	0.0%
Total Value	515,200	269,220	91.37%

Top Gainers List			
Counter	21-Jan-25	20-Jan-25	%Δ
Trans-Century	0.72	0.55	30.9%
Xpress	3.40	3.10	9.7%
Home Africa	0.40	0.37	8.1%
Standard Group	4.84	4.54	6.6%
Cables	1.20	1.13	6.2%

Top Losers Chart			
Counter	21-Jan-25	20-Jan-25	%Δ
Kenya Airways	6.90	7.66	-9.9%
Unga Group	16.05	17.80	-9.8%
Kenya Power	6.60	6.86	-3.8%
CIC Group	2.59	2.68	-3.4%
TPS	14.50	15.00	-3.3%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	59.56	-36.34	-263.9%
Foreign Sales %	16.9%	35.3%	
Foreign Sales (KES Mn)	73.31	75.62	3.2%
Foreign Sales (USD Mn)	0.57	0.58	3.2%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	12.29	39.76	17.0%
Stanbic	0.17	22.77	91.8%
StanChart	0.06	4.31	25.6%
EABL	0.14	3.76	15.0%
Kengen	0.75	0.82	26.4%

Currency Performance			
	21-Jan-25	20-Jan-25	%Δ
KES/USD	129.5370	129.4729	0.0%
KES/GBP	159.2204	158.0152	0.0%
KES/EUR	133.9024	133.4024	-0.4%
KES/JPY	82.9116	82.2860	-0.8%

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Equities Pricelist

AGRICULTURAL	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	13.00	12.00	12.10	11.90	2,200	26,620	-	-
Kakuzi Plc Ord.5.00	-	-	395.00	395.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	240.00	240.00	240.00	235.00	400	96,000	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	314.00	314.00	-	-	-	-
Sasini Plc Ord 1.00	15.00	14.85	14.90	14.80	29,100	433,590	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	216.00	215.00	215.25	217.25	600	129,150	-	86,000
AUTOMOBILES & ACCESSORIES	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	23.50	20.55	22.05	22.25	400	8,820	-	-
BANKING	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	17.30	17.10	17.20	17.25	83,800	1,441,360	-	345,000
BK Group Plc Ord 0.80	34.95	34.90	34.95	35.00	2,500	87,375	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	70.00	69.00	69.25	69.00	150,900	10,449,825	-	264,800
Equity Group Holdings Plc Ord 0.50	49.80	48.00	48.75	48.45	466,900	22,761,375	20,726,940	533,500
HF Group Plc Ord 5.00	9.74	8.96	9.42	8.96	345,600	3,255,552	-	-
I&M Group Plc Ord 1.00	34.00	33.00	33.30	32.60	90,600	3,016,980	-	-
KCB Group Plc Ord 1.00	44.00	43.30	43.60	43.10	941,600	41,053,760	241,750	258,715
NCBA Group Plc Ord 5.00	49.00	47.70	48.10	48.85	142,700	6,863,870	-	-
Stanbic Holdings Plc ord.5.00	143.00	135.00	142.75	141.50	173,700	24,795,675	7,177,600	22,765,600
Standard Chartered Bank Kenya Ltd Ord 5.00	290.00	280.00	281.00	279.25	59,900	16,831,900	6,496,000	4,305,600
The Co-operative Bank of Kenya Ltd Ord 1.00	16.50	15.90	16.05	16.25	606,900	9,740,745	140,125	-
COMMERCIAL AND SERVICES	High	Low	21-Jan-25	20-Jan-25	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	1.22	1.15	42,200	51,484	-	-
Express Kenya Plc Ord 5.00AIMS	3.40	3.40	3.40	3.10	200	680	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	6.90	6.90	6.90	7.66	459,300	3,169,170	-	-
Longhorn Publishers Plc Ord 1.00AIMS	2.75	2.50	2.61	2.50	63,100	164,691	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.09	2.05	2.09	2.07	3,700	7,733	-	-
Nation Media Group Plc Ord. 2.50	13.95	13.20	13.35	13.70	27,200	363,120	-	-
Sameer Africa Plc Ord 5.00	2.54	2.54	2.54	2.54	12,800	32,512	-	-
Standard Group Plc Ord 5.00	4.90	4.80	4.84	4.54	500	2,420	-	-
TPS Eastern Africa Ltd Ord 1.00	14.50	14.50	14.50	15.00	2,300	33,350	-	-
Uchumi Supermarket Plc Ord 5.00	0.22	0.20	0.21	0.20	1,036,700	217,707	-	-
WPP Scangroup Plc Ord 1.00	3.16	2.98	3.00	2.88	43,800	131,400	-	-
CONSTRUCTION & ALLIED	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	56.75	56.00	56.25	56.75	7,500	421,875	-	-
Crown Paints Kenya Plc Ord 5.00	-	-	33.00	33.00	-	-	-	-
E.A.Cables Ltd Ord 0.50	1.24	1.15	1.20	1.13	280,800	336,960	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	27.60	27.50	27.50	27.20	1,200	33,000	-	-
ENERGY & PETROLEUM	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	4.21	4.02	4.13	4.14	750,800	3,100,804	-	817,767
Kenya Power & Lighting Co Plc Ord 2.50	6.80	6.40	6.60	6.86	853,100	5,630,460	-	20,220
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	22.60	21.05	21.35	20.65	1,800	38,430	-	-
Umeme Ltd Ord 0.50	17.10	16.90	16.95	17.00	14,100	238,995	-	-
INSURANCE	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	8.10	7.50	8.00	7.84	94,500	756,000	-	-
CIC Insurance Group Ltd Ord.1.00	2.60	2.51	2.59	2.68	159,900	414,141	260	12,600
Jubilee Holdings Ltd Ord 5.00	192.00	192.00	192.00	194.00	4,500	864,000	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.72	1.68	1.70	1.67	4,956,400	8,425,880	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	7.20	7.20	7.20	7.30	600	4,320	-	-
Sanlam Kenya Plc Ord 5.00	6.40	6.18	6.24	6.18	17,700	110,448	-	-
INVESTMENT	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	12.45	11.05	12.00	11.80	6,600	79,200	-	-
Home Afrika Ltd Ord 1.00GEMS	0.40	0.36	0.40	0.37	352,500	141,000	-	-

Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.20	3.01	3.03	3.12	1,800	5,454	-	-
Trans-Century Plc Ord 0.50AIMS	1.10	0.60	0.72	0.55	761,500	548,280	-	-
INVESTMENT SERVICES	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	6.60	6.40	6.44	6.40	14,900	95,956	-	-
MANUFACTURING & ALLIED	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	-	-	86.00	86.00	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	372.00	360.00	369.75	370.00	18,500	6,840,375	-	369,750
Carbacid Investments Plc Ord 1.00	19.80	19.35	19.70	19.80	2,800	55,160	-	-
East African Breweries Plc Ord 2.00	187.00	182.00	183.00	180.25	137,200	25,107,600	8,486,425	3,764,200
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.04	0.98	0.99	0.99	85,800	84,942	-	-
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	16.05	16.05	16.05	17.80	1,300	20,865	-	-
TELECOMMUNICATION	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	19.15	18.90	19.00	18.90	12,285,400	233,422,600	89,602,970	39,764,240
REAL ESTATE INVESTMENT TRUST	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	-
EXCHANGE TRADED FUNDS	High	Low	21-Jan-25	20-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3280i	3280i	3,280.00	3,260.00	-	-	-	-

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