

Daily Market Wrap

- NSE market prices shed 0.1% in prices on Wednesday, January 22, 2025, after days of an uprise. NSE 10 and NSE 25 stocks however rose 0.6% each while NSE 20 lost 0.2%.
- The day's value traded jumped 11.5% up from KES 432.18Mn to KES 481.89Mn mainly on improved transactions in the banking sector. This despite a further decline in foreign transactions from an average of 23.7% to 22.8% with a rise in net foreign outflows of KES 58.72Mn compared to an inflow of KES 59.56Mn recorded on Tuesday.
- Focus shifted to the banking sector to trade a total value of KES 394.17Mn from 28.21Mn shares, representing 81.8% and 60.7% of the market value and volumes traded respectively. As a result, the sector produced the day's top two market movers.
- HF Group emerged top with KES 215.70Mn turnover after trading a total of 24.07Mn shares. This saw HF's price dip 4.9% from KES 9.42Mn to KES 8.96 per share after weeks of an uprise. KCB Group took second top mover position with 2.78Mn shares of KES 122.37Mn as its price rose further by 1.0% from KES 43.60 to KES 44.05 per share.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,353.39	1,345.21	0.6%
N20 Share Index	2,165.73	2,169.42	-0.2%
NSE 25 Share Index	3,529.74	3,507.54	0.6%
NASI	131.73	131.83	-0.1%
Mkt Capitalization(Bn)	2,069.32	2,070.90	-0.1%
Volumes Traded (Mn)	46.49	25.60	81.6%
Equities Turnover (Mn)	481.89	432.18	11.5%
Bonds Turnover(Mn)	9,128.05	9,128.05	0.0%
DAY'S TOP MOVERS			
Turnovers (KES Mn)	Price	Av. Foreign %	
HF Group	215.70	8.96	0.0%
KCB Group	122.37	44.05	61.1%
Safaricom	27.44	18.90	67.2%
Kengen	16.04	4.05	0.0%
Sameer	13.54	2.50	
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	22.8%	23.7%	
Foreign Buys %	16.7%	30.6%	
Foreign Buys (KES Mn)	80.78	132.87	-64.5%
Foreign Buys (USD Mn)	0.62	1.03	-64.3%
Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
KCB Group	2.78	45.04	36.8%
Safaricom	1.45	20.22	73.6%
Stanbic	0.08	9.87	94.5%
EABL	0.02	3.23	96.7%
StanChart	0.03	1.52	15.7%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	11	11	0.0%
Open contracts	331	331	0.0%
Total Value	515,200	515,200	0.00%

Top Gainers List			
Counter	22-Jan-25	21-Jan-25	%Δ
Cables	1.32	1.20	10.0%
Unga Group	17.65	16.05	10.0%
Trans-Century	0.79	0.72	9.7%
Uchumi	0.23	0.21	9.5%
Flame tree	1.05	0.99	6.1%

Top Losers Chart			
Counter	22-Jan-25	21-Jan-25	%Δ
Kenya Airways	6.22	6.90	-9.9%
Portland cement	25.20	27.50	-8.4%
HF Group	8.96	9.42	-4.9%
BK Group	33.50	34.95	-4.1%
Stanbic	138.25	142.75	-3.2%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-58.72	59.56	-198.6%
Foreign Sales %	28.9%	16.9%	
Foreign Sales (KES Mn)	139.51	73.31	-47.5%
Foreign Sales (USD Mn)	1.08	0.57	-47.5%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
KCB Group	2.78	104.45	85.4%
Safaricom	1.45	16.70	60.8%
BK Group	0.25	8.38	98.7%
NCBA Group	0.14	4.90	71.1%
DTBK	0.06	2.72	66.9%

Currency Performance			
	22-Jan-25	21-Jan-25	%Δ
KES/USD	129.4248	129.5648	0.1%
KES/GBP	159.6390	159.2287	0.0%
KES/EUR	134.7442	134.5530	-0.1%
KES/JPY	82.9939	83.4798	0.6%

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Equities Pricelist

	High	Low	22-Jan-25	21-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
AGRICULTURAL								
Eaagads Ltd Ord 1.25 AIMS	-	-	12.10	12.10	-	-	-	-
Kakuzi Plc Ord.5.00	-	-	395.00	395.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	-	-	240.00	240.00	-	-	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	314.00	314.00	-	-	-	-
Sasini Plc Ord 1.00	15.00	14.90	14.90	14.90	19,100	284,590	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	216.00	216.00	216.00	215.25	1,300	280,800	-	-
AUTOMOBILES & ACCESSORIES								
Car & General (K) Ltd Ord 5.00	-	-	22.05	22.05	-	-	-	-
BANKING								
ABSA Bank Kenya Plc Ord 0.50	17.70	17.05	17.45	17.20	313,000	5,461,850	-	468,600
BK Group Plc Ord 0.80	34.90	33.50	33.50	34.95	253,100	8,478,850	-	8,375,000
Diamond Trust Bank Kenya Ltd Ord 4.00	70.50	69.25	70.00	69.25	58,200	4,074,000	-	2,723,700
Equity Group Holdings Plc Ord 0.50	49.65	48.10	49.15	48.75	94,700	4,654,505	268,600	-
HF Group Plc Ord 5.00	9.50	8.48	8.96	9.42	24,073,300	215,696,768	-	-
I&M Group Plc Ord 1.00	34.95	33.05	34.70	33.30	10,700	371,290	-	-
KCB Group Plc Ord 1.00	45.00	43.85	44.05	43.60	2,777,900	122,366,495	45,042,800	104,446,700
NCBA Group Plc Ord 5.00	50.00	48.00	49.00	48.10	140,600	6,889,400	-	4,900,000
Stanbic Holdings Plc ord.5.00	143.00	138.00	138.25	142.75	75,600	10,451,700	9,867,000	-
Standard Chartered Bank Kenya Ltd Ord 5.00	290.00	281.00	281.50	281.00	34,400	9,683,600	1,517,400	-
The Co-operative Bank of Kenya Ltd Ord 1.00	16.20	15.90	16.05	16.05	376,300	6,039,615	296,800	-
COMMERCIAL AND SERVICES								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.25	1.22	1.24	1.22	7,800	9,672	-	-
Express Kenya Plc Ord 5.00AIMS	3.40	3.10	3.32	3.40	3,800	12,616	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	6.22	6.22	6.22	6.90	205,500	1,278,210	-	-
Longhorn Publishers Plc Ord 1.00AIMS	2.75	2.60	2.65	2.61	16,400	43,460	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.15	2.00	2.06	2.09	11,200	23,072	-	20,295
Nation Media Group Plc Ord. 2.50	13.50	13.05	13.10	13.35	93,700	1,227,470	-	964,935
Sameer Africa Plc Ord 5.00	2.79	2.50	2.50	2.54	5,414,200	13,535,500	-	-
Standard Group Plc Ord 5.00	-	-	4.84	4.84	-	-	-	-
TPS Eastern Africa Ltd Ord 1.00	15.00	15.00	15.00	14.50	6,500	97,500	-	18,000
Uchumi Supermarket Plc Ord 5.00	0.23	0.20	0.23	0.21	650,100	149,523	-	-
WPP Scangroup Plc Ord 1.00	3.30	2.80	2.99	3.00	56,800	169,832	-	-
CONSTRUCTION & ALLIED								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	56.50	55.25	56.50	56.25	4,300	242,950	-	-
Crown Paints Kenya Plc Ord 5.00	33.30	33.00	33.15	33.00	200	6,630	-	-
E.A.Cables Ltd Ord 0.50	1.32	1.32	1.32	1.20	44,700	59,004	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	30.25	24.75	25.20	27.50	11,000	277,200	-	-
ENERGY & PETROLEUM								
KenGen Co. Plc Ord. 2.50	4.14	4.03	4.05	4.13	3,959,600	16,036,380	-	-
Kenya Power & Lighting Co Plc Ord 2.50	6.70	6.20	6.48	6.60	727,400	4,713,552	3,250	-
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	22.60	21.00	21.95	21.35	8,400	184,380	-	-
Umeme Ltd Ord 0.50	17.00	16.95	17.00	16.95	3,100	52,700	-	-
INSURANCE								
Britam Holdings Plc Ord 0.10	8.16	8.00	8.08	8.00	329,700	2,663,976	-	-
CIC Insurance Group Ltd Ord.1.00	2.58	2.50	2.53	2.59	317,900	804,287	-	3,024
Jubilee Holdings Ltd Ord 5.00	200.00	200.00	200.00	192.00	29,100	5,820,000	-	220,000
Kenya Re Insurance Corporation Ltd Ord 2.50	1.75	1.68	1.70	1.70	3,394,000	5,769,800	-	342,000
Liberty Kenya Holdings Ltd Ord. 1.00	7.30	7.10	7.30	7.20	7,000	51,100	-	-
Sanlam Kenya Plc Ord 5.00	6.50	6.10	6.20	6.24	1,000	6,200	-	-
INVESTMENT								
Centum Investment Co Plc Ord 0.50	12.95	11.60	12.10	12.00	41,000	496,100	-	318,655
Home Afrika Ltd Ord 1.00GEMS	0.41	0.38	0.40	0.40	277,500	111,000	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.20	3.10	3.20	3.03	2,500	8,000	-	-
Trans-Century Plc Ord 0.50AIMS	0.79	0.79	0.79	0.72	923,900	729,881	-	-
INVESTMENT SERVICES								
Nairobi Securities Exchange Plc Ord 4.00	6.80	6.42	6.44	6.44	26,500	170,660	-	-

MANUFACTURING & ALLIED	High	Low	22-Jan-25	21-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	86.00	86.00	86.00	86.00	200	17,200	-	-
British American Tobacco Kenya Plc Ord 10.00	370.00	368.00	369.50	369.75	500	184,750	-	-
Carbacid Investments Plc Ord 1.00	20.00	19.80	19.80	19.70	28,100	556,380	-	-
East African Breweries Plc Ord 2.00	185.00	181.00	184.75	183.00	18,100	3,343,975	3,234,700	-
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.08	1.03	1.05	0.99	161,200	169,260	-	-
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	17.65	17.65	17.65	16.05	24,400	430,660	-	-
TELECOMMUNICATION	High	Low	22-Jan-25	21-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	19.00	18.80	18.90	19.00	1,452,100	27,444,690	20,223,720	16,704,220
REAL ESTATE INVESTMENT TRUST	High	Low	22-Jan-25	21-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	22-Jan-25	21-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3260i	3260i	3,260.00	3,260.00	100	326,000	326,000	-

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