

Daily Market Wrap

- Stock prices were relatively stable on Tuesday, January 28, 2025, going up minimally at 0.1% on average. NSE 10 and NSE 25 remained stable while NSE 20 shed 0.2%. Market activity however improved 76.4% to trade 24.92Mn shares with a focus on high value stocks to double the value traded at 246.5% to KES 590.60Mn.
- The banking, telecommunication and the manufacturing sectors remained the focus of investors to transact 37.1%, 34.4% and 16.7% of the day's turnovers. Cumulative the three sectors moved 88.3% of the market value, pointing out to the investors' attention.
- Safaricom regained back her top mover position after changing hands 10.78Mn shares of KES 203.13Mn while its price moved 0.3% up from KES 18.80 to KES 18.85 per share. The stock remains among our top long-term stock recommendations.
- EABL took second mover position with KES 97.18Mn from 504,000 shares ahead of its half year 2025 results expected on Friday, 31st January 2025. Watch out for our update.
- Banks followed to occupy the net three position led by Equity Group, KCB Group and Stanbic Group.

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Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,370.37	1,370.90	0.0%
N20 Share Index	2,190.92	2,195.12	-0.2%
NSE 25 Share Index	3,569.94	3,570.86	0.0%
NASI	132.28	132.11	0.1%
Mkt Capitalization(Bn)	2,077.93	2,075.36	0.1%
Volumes Traded (Mn)	24.92	14.13	76.4%
Equities Turnover (Mn)	590.60	170.47	246.5%
Bonds Turnover(Mn)	6,626.50	6,007.01	10.3%
Day's Top Movers			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
Safaricom	203.13	18.85	69.5%
EABL	97.78	194.00	87.3%
Equity Group	64.65	48.50	0.4%
KCB Group	62.54	45.10	4.5%
Stanbic	43.01	139.25	96.2%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	41.9%	60.1%	
Foreign Buys %	47.3%	70.9%	
Foreign Buys (KES Mn)	80.57	323.92	-302.0%
Foreign Buys (USD Mn)	0.62	2.51	-302.0%
Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	10.78	147.09	92.5%
EABL	0.50	106.55	99.9%
Stanbic	0.31	62.31	93.2%
StanChart	0.01	3.53	38.7%
DTBK	0.32	3.28	67.4%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	1	6	-83.3%
Open contracts	328	327	0.3%
Total Value	45,010	278,400	-83.83%

Top Gainers List			
Counter	28-Jan-25	27-Jan-25	%Δ
Portland cement	28.85	26.25	9.9%
Cables	1.90	1.73	9.8%
Xpress	3.25	2.99	8.7%
Flame tree	1.41	1.30	8.5%
Home Africa	0.53	0.49	8.2%

Top Losers Chart			
Counter	28-Jan-25	27-Jan-25	%Δ
Liberty Kenya	6.74	7.38	-8.7%
Crown Paints	30.20	33.00	-8.5%
Sanlam Kenya	6.32	6.84	-7.6%
Totalenergies	21.25	22.55	-5.8%
Centum	11.35	12.00	-5.4%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	18.38	99.12	-81.5%
Foreign Sales %	36.5%	49.2%	
Foreign Sales (KES Mn)	62.19	224.80	261.5%
Foreign Sales (USD Mn)	0.48	1.74	261.5%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
EABL	0.50	79.62	74.7%
Safaricom	10.78	73.93	46.5%
Stanbic	0.31	66.32	99.2%
KCB Group	1.39	2.47	9.1%
Kengen	1.23	0.90	11.5%

Currency Performance			
	28-Jan-25	27-Jan-25	%Δ
KES/USD	129.2533	129.2560	0.0%
KES/GBP	160.7976	160.3808	0.0%
KES/EUR	134.8113	134.3633	-0.3%
KES/JPY	82.9258	82.6366	-0.3%

Equities Pricelist

	High	Low	28-Jan-25	27-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
AGRICULTURAL								
Eaagads Ltd Ord 1.25 AIMS	13.50	13.50	13.50	13.65	3,700	49,950	-	-
Kakuzi Plc Ord.5.00	-	-	395.00	395.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	240.00	240.00	240.00	240.00	1,100	264,000	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	314.00	314.00	-	-	-	-
Sasini Plc Ord 1.00	15.25	14.95	15.00	15.15	24,900	373,500	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	215.00	213.00	214.00	214.75	900	192,600	-	-
AUTOMOBILES & ACCESSORIES								
Car & General (K) Ltd Ord 5.00	26.50	24.00	24.70	24.10	1,800	44,460	-	7,200
BANKING								
ABSA Bank Kenya Plc Ord 0.50	18.10	17.40	17.90	17.95	99,100	1,773,890	-	-
BK Group Plc Ord 0.80	-	-	34.40	34.40	-	-	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	70.00	69.00	69.50	69.75	318,700	22,149,650	-	21,517,350
Equity Group Holdings Plc Ord 0.50	49.00	48.50	48.50	48.55	1,333,000	64,650,500	9,506,000	48,500,000
HF Group Plc Ord 5.00	7.90	6.70	7.28	7.44	1,299,700	9,461,816	-	-
I&M Group Plc Ord 1.00	35.40	34.90	35.15	35.05	14,400	506,160	-	-
KCB Group Plc Ord 1.00	45.80	44.50	45.10	45.35	1,386,800	62,544,680	2,729,700	56,980,950
NCBA Group Plc Ord 5.00	50.00	49.00	49.50	49.75	213,900	10,588,050	-	9,900,000
Stanbic Holdings Plc ord.5.00	145.00	139.00	139.25	139.00	308,900	43,014,325	39,879,100	41,720,900
Standard Chartered Bank Kenya Ltd Ord 5.00	285.00	282.00	283.00	283.00	10,400	2,943,200	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	16.95	16.15	16.40	16.30	106,300	1,743,320	-	-
COMMERCIAL AND SERVICES								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.25	1.23	1.25	1.22	21,300	26,625	-	-
Express Kenya Plc Ord 5.00AIMS	3.28	3.20	3.25	2.99	5,300	17,225	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	5.50	5.00	5.42	5.10	445,800	2,416,236	65,250	11,690
Longhorn Publishers Plc Ord 1.00AIMS	2.80	2.70	2.74	2.70	15,800	43,292	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.26	2.20	2.21	2.20	1,500	3,315	-	-
Nation Media Group Plc Ord. 2.50	13.35	13.10	13.30	13.30	70,600	938,980	-	-
Sameer Africa Plc Ord 5.00	2.79	2.50	2.71	2.61	11,600	31,436	-	-
Standard Group Plc Ord 5.00	5.20	4.90	5.04	5.00	300	1,512	-	500
TPS Eastern Africa Ltd Ord 1.00	14.90	14.90	14.90	14.00	100	1,490	-	-
Uchumi Supermarket Plc Ord 5.00	0.25	0.22	0.24	0.23	379,200	91,008	-	-
WPP Scangroup Plc Ord 1.00	2.99	2.80	2.81	2.97	104,900	294,769	-	-
CONSTRUCTION & ALLIED								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	60.00	55.50	58.00	56.50	617,162	35,795,396	-	-
Crown Paints Kenya Plc Ord 5.00	32.00	30.00	30.20	33.00	1,300	39,260	-	-
E.A.Cables Ltd Ord 0.50	1.90	1.74	1.90	1.73	442,500	840,750	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	28.85	28.70	28.85	26.25	16,400	473,140	-	-
ENERGY & PETROLEUM								
KenGen Co. Plc Ord. 2.50	4.18	4.06	4.10	4.12	1,231,800	5,050,380	-	415,324
Kenya Power & Lighting Co Plc Ord 2.50	6.70	6.20	6.36	6.40	932,300	5,929,428	5,626	-
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	22.50	20.60	21.25	22.55	1,700	36,125	-	-
Umeme Ltd Ord 0.50	17.50	17.00	17.05	17.00	137,700	2,347,785	-	-
INSURANCE								
Britam Holdings Plc Ord 0.10	8.90	8.30	8.46	8.54	159,000	1,345,140	504,000	-
CIC Insurance Group Ltd Ord.1.00	2.70	2.63	2.65	2.63	170,300	451,295	-	-
Jubilee Holdings Ltd Ord 5.00	205.00	202.00	205.00	200.50	13,600	2,788,000	-	20,200
Kenya Re Insurance Corporation Ltd Ord 2.50	1.74	1.70	1.71	1.70	1,748,200	2,989,422	-	510,000
Liberty Kenya Holdings Ltd Ord. 1.00	7.38	6.66	6.74	7.38	12,100	81,554	-	-
Sanlam Kenya Plc Ord 5.00	6.80	6.20	6.32	6.84	6,800	42,976	-	-
INVESTMENT								
Centum Investment Co Plc Ord 0.50	12.25	11.00	11.35	12.00	16,000	181,600	-	-
Home Afrika Ltd Ord 1.00GEMS	0.53	0.53	0.53	0.49	231,400	122,642	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.40	3.30	3.32	3.28	6,200	20,584	-	-
Trans-Century Plc Ord 0.50AIMS	1.08	0.98	1.05	0.99	1,597,500	1,677,375	-	-
INVESTMENT SERVICES								
Nairobi Securities Exchange Plc Ord 4.00	6.70	6.22	6.44	6.48	26,700	171,948	-	-

MANUFACTURING & ALLIED	High	Low	28-Jan-25	27-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	-	-	80.50	80.50	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	370.00	368.00	368.25	369.50	1,600	589,200	-	-
Carbacid Investments Plc Ord 1.00	19.70	19.65	19.70	20.00	4,700	92,590	-	-
East African Breweries Plc Ord 2.00	198.00	181.00	194.00	193.50	504,000	97,776,000	97,633,200	97,019,500
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.43	1.30	1.41	1.30	73,800	104,058	-	-
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	21.55	20.00	20.10	19.60	9,300	186,930	-	2,155
TELECOMMUNICATION	High	Low	28-Jan-25	27-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	18.90	18.40	18.85	18.80	10,776,300	203,133,255	1,918,570	192,091,540
REAL ESTATE INVESTMENT TRUST	High	Low	28-Jan-25	27-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	28-Jan-25	27-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3350i	3350i	3,350.00	3,260.00	-	-	-	-

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