

### Daily Market Wrap

- Equities price further went up 0.6% on Tuesday, February 18, 2025, elevated mainly by gains in the low/small capitalization counters. NSE 10 gained 0.3% as NSE 25 gathered 0.5% while NSE 20 remained flat at 2,223.99 points.
- The day's market activity however, dipped 36.7% from 27.25Mn to transact 17.25Mn shares and thereby pulling the value traded 11.7% down to KES 302.24Mn.
- Sector wise performance saw the banking sector overtake the telecommunications after trading only 4.09Mn shares valued at KES 169.89Mn. This was led by continued attention on KCB Group which transacted KES 89.71Mn from 1.99Mn shares and Equity Group which traded 0.81Mn shares of KES 37.80Mn. The banking sector's price improved marginally at an average of 0.1% in the day.
- Safaricom took second top mover position after exchanging KES 68.87Mn from 3.68Mn shares to further push its price 1.1% up from KES 18.50 to KES 18.70 per share.
- The secondary bonds market remained active to traded KES 36.25Bn from 218 deals, a 287.8% jump from KES 9.35Bn of 96 transactions traded on Monday. The fast rise in value in bonds activity follows entry of the re-opened infrastructure bond papers, IFB1/2022/14 and IFB1/2023/17, which re-entered the secondary bonds market trading yesterday. This is as investors who missed try in the primary auction take early positions to avoid higher premiums as interest rates narrow down.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,366.58	1,358.25	0.6%
N20 Share Index	2,223.99	2,224.74	0.0%
NSE 25 Share Index	3,577.81	3,561.07	0.5%
NASI	132.73	131.91	0.6%
Mkt Capitalization(Bn)	2,085.09	2,072.13	0.6%
Volumes Traded (Mn)	17.25	27.25	-36.7%
Equities Turnover (Mn)	302.24	342.38	-11.7%
Bonds Turnover(Mn)	36,252.75	9,347.55	287.8%

Day's Top Movers			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
KCB Group	89.71	45.10	36.4%
Safaricom	68.87	18.70	56.8%
Equity Group	37.80	46.85	49.0%
EABL	19.08	192.00	52.4%
Kengen	16.39	4.78	0.0%

Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	36.8%	53.7%	
Foreign Buys %	19.9%	48.7%	
Foreign Buys (KES Mn)	60.15	168.83	-180.7%
Foreign Buys (USD Mn)	0.47	1.31	-180.8%

Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	3.68	39.16	56.8%
EABL	0.10	19.01	99.6%
Kenya Power	1.62	1.45	12.8%
StanChart	0.01	0.26	15.9%
Absa (K)	0.08	0.15	10.1%

Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	-	-	-
Open contracts	304	304	0.0%
Total Value	-	-	-

Top Gainers List			
Counter	18-Feb-25	17-Feb-25	%Δ
Africa Mega Agricorp	56.50	51.50	9.7%
TPS	15.50	14.15	9.5%
Eveready	1.33	1.24	7.3%
Uchumi	0.28	0.27	3.7%
Car-General	24.00	23.15	3.7%

Top Losers Chart			
Counter	18-Feb-25	17-Feb-25	%Δ
Sanlam Kenya	6.86	7.24	-5.2%
kapchorua	230.00	240.00	-4.2%
NBV	2.03	2.10	-3.3%
HF Group	7.70	7.96	-3.3%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-102.68	-34.93	194.0%
Foreign Sales %	53.8%	58.7%	
Foreign Sales (KES Mn)	162.83	203.75	25.1%
Foreign Sales (USD Mn)	1.26	1.58	25.2%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
KCB Group	1.99	65.21	72.7%
Safaricom	3.68	39.15	56.8%
Equity Group	0.81	37.01	97.9%
Stanbic	0.10	14.89	98.3%
BAT	0.01	4.82	97.1%

Currency Performance			
	18-Feb-25	17-Feb-25	%Δ
KES/USD	129.2803	129.2240	0.0%
KES/GBP	163.0548	162.7836	0.0%
KES/EUR	135.5245	135.6464	0.1%
KES/JPY	85.3871	85.2179	-0.2%

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### Equities Pricelist

AGRICULTURAL	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	14.00	14.00	14.00	14.00	700	9,800	-	-
Kakuzi Plc Ord.5.00	396.00	396.00	396.00	396.00	800	316,800	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	230.00	230.00	230.00	240.00	100	23,000	23,000	-
The Limuru Tea Co. Plc Ord 20.00AIMS	-	-	299.00	299.00	-	-	-	-
Sasini Plc Ord 1.00	15.50	15.45	15.45	15.45	18,400	284,280	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	218.00	215.00	215.50	216.75	1,300	280,150	-	-
AUTOMOBILES & ACCESSORIES	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	24.00	24.00	24.00	23.15	700	16,800	-	-
BANKING	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	18.60	18.45	18.50	18.45	79,500	1,470,750	148,000	173,900
BK Group Plc Ord 0.80	34.50	34.50	34.50	34.20	2,600	89,700	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	83.25	77.00	78.00	76.00	43,600	3,400,800	-	-
Equity Group Holdings Plc Ord 0.50	46.95	46.60	46.85	47.00	806,900	37,803,265	18,700	37,008,635
HF Group Plc Ord 5.00	7.98	7.50	7.70	7.96	179,300	1,380,610	-	-
I&M Group Plc Ord 1.00	36.00	35.95	35.95	36.00	17,800	639,910	-	-
KCB Group Plc Ord 1.00	45.50	44.80	45.10	45.05	1,989,200	89,712,920	49,775	65,209,215
NCBA Group Plc Ord 5.00	50.00	49.00	49.05	49.90	124,600	6,111,630	-	-
Stanbic Holdings Plc ord.5.00	149.00	145.00	148.00	149.00	102,300	15,140,400	-	14,889,400
Standard Chartered Bank Kenya Ltd Ord 5.00	294.00	290.00	291.50	287.00	5,700	1,661,550	264,600	-
The Co-operative Bank of Kenya Ltd Ord 1.00	17.35	16.55	16.90	16.55	738,500	12,480,650	-	-
COMMERCIAL AND SERVICES	High	Low	18-Feb-25	17-Feb-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	1.36	1.29	1.33	1.24	7,900	10,507	-	-
Express Kenya Plc Ord 5.00AIMS	-	-	3.49	3.49	-	-	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	5.40	5.20	5.32	5.40	433,600	2,306,752	-	-
Longhorn Publishers Plc Ord 1.00AIMS	3.40	3.00	3.15	3.30	500	1,575	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.14	2.00	2.03	2.10	5,800	11,774	-	-
Nation Media Group Plc Ord. 2.50	14.50	13.90	14.05	14.50	17,700	248,685	-	-
Sameer Africa Plc Ord 5.00	3.29	3.00	3.19	3.29	2,400	7,656	-	-
Standard Group Plc Ord 5.00	6.58	6.58	6.58	6.58	100	658	-	-
TPS Eastern Africa Ltd Ord 1.00	15.50	15.50	15.50	14.15	1,400	21,700	-	18,600
Uchumi Supermarket Plc Ord 5.00	0.29	0.27	0.28	0.27	379,900	106,372	-	-
WPP Scangroup Plc Ord 1.00	3.48	3.15	3.44	3.48	11,100	38,184	-	-
CONSTRUCTION & ALLIED	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	58.00	56.00	57.25	57.25	4,100	234,725	-	-
Crown Paints Kenya Plc Ord 5.00	33.00	33.00	33.00	31.85	900	29,700	-	-
E.A.Cables Ltd Ord 0.50	2.67	2.40	2.48	2.43	83,900	208,072	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	38.00	35.00	35.25	36.15	8,500	299,625	-	-
ENERGY & PETROLEUM	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	4.85	4.75	4.78	4.76	3,429,300	16,392,054	-	-
Kenya Power & Lighting Co Plc Ord 2.50	7.10	6.90	7.00	6.90	1,616,700	11,316,900	1,449,000	41,182
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	22.95	22.50	22.55	22.90	10,400	234,520	-	-
Umeme Ltd Ord 0.50	16.70	16.65	16.65	16.65	21,200	352,980	-	3,340
INSURANCE	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	7.50	6.90	7.02	6.98	71,400	501,228	21,000	2,250
CIC Insurance Group Ltd Ord.1.00	3.05	2.66	2.79	2.88	178,200	497,178	-	-

Jubilee Holdings Ltd Ord 5.00	202.00	200.00	200.00	200.00	1,800	360,000	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.70	1.67	1.69	1.69	1,316,800	2,225,392	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	8.00	8.00	8.00	7.96	3,500	28,000	-	-
Sanlam Kenya Plc Ord 5.00	7.70	6.52	6.86	7.24	3,400	23,324	-	-

INVESTMENT	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	12.35	11.35	11.90	12.15	47,500	565,250	-	-
Home Afrika Ltd Ord 1.00GEMS	0.99	0.94	0.96	0.93	625,000	600,000	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.28	3.28	3.28	3.28	100	328	-	-
Trans-Century Plc Ord 0.50AIMS	1.43	1.19	1.32	1.30	493,400	651,288	2,210	-

INVESTMENT SERVICES	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	6.74	6.26	6.52	6.46	15,400	100,408	5,940	-

MANUFACTURING & ALLIED	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	81.00	80.25	80.75	80.00	400	32,300	-	-
British American Tobacco Kenya Plc Ord 10.00	365.00	363.00	365.00	364.75	13,600	4,964,000	-	4,818,000
Carbacid Investments Plc Ord 1.00	21.95	21.35	21.90	22.00	4,900	107,310	-	-
East African Breweries Plc Ord 2.00	193.00	183.00	192.00	188.00	99,400	19,084,800	19,006,700	977,600
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.70	1.40	1.51	1.55	542,000	818,420	-	532,267
Kenya Orchards Ltd Ord 5.00AIMS	56.50	56.50	56.50	51.50	100	5,650	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	20.50	20.50	20.50	20.00	200	4,100	-	-

TELECOMMUNICATION	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	19.00	18.50	18.70	18.50	3,682,900	68,870,230	39,162,180	39,153,945

REAL ESTATE INVESTMENT TRUST	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
LAPTRUST IMARA I-REIT Ord.20.00	-	-	20.00	20.00	-	-	-	-

EXCHANGE TRADED FUNDS	High	Low	18-Feb-25	17-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3515i	3515i	3,515.00	3,455.00	-	-	-	-

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