

Daily Market Wrap

- Stocks prices maintained an upward trend on Wednesday, February 19, 2025, to gain for the third consecutive trading day at 0.8% on anticipations of a better earning season for full year 2024 due in March 2025. NSE 10 gained 0.8% followed by NSE 25 and NSE 20 with gains of 0.7% and 0.6% respectively.
- Market activity improved by over half from 17.25Mn to 26.79Mn shares to push the value traded 62.1% up from KES 302.24Mn to KES 489.96Mn.
- The banking sector retained the top mover position after exchanging KES 337.60Mn from 13.48Mn shares followed by the telecommunication with KES 107.18Mn of 5.66Mn shares. The two sectors controlled 90.8% of the market value. The manufacturing and the energy sectors followed with values of KES 22.38Mn and KES 10.57Mn respectively.
- Market attention shifted to Absa Bank (K) which emerged top mover with KES 200.96Mn from 10.52Mn shares. This saw the counter's price accelerate 3.2% up from KES 18.50 to hit a 14-year high of KES 19.10 last seen in 2011. We recommend a SELL on the counter's stock a head of its earnings to realize capital gains.
- Safaricom's price further gained 1.3% from KES 18.70 to KES 18.95 per share a head of its KES 0.55 per share interim dividend book closure scheduled for 3rd March 2025 for a payment on 31st March 2024. This saw the counter retain the second top mover position with KES 107.18Mn from 5.66Mn shares.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,376.90	1,366.58	0.8%
N20 Share Index	2,237.81	2,223.99	0.6%
NSE 25 Share Index	3,603.14	3,577.81	0.7%
NASI	133.86	132.73	0.9%
Mkt Capitalization(Bn)	2,102.74	2,085.09	0.8%
Volumes Traded (Mn)	26.79	17.25	55.3%
Equities Turnover (Mn)	489.96	302.24	62.1%
Bonds Turnover(Mn)	34,246.40	36,252.75	-5.5%
Day's Top Movers			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
Absa (K)	200.96	19.10	0.1%
Safaricom	107.18	18.95	48.8%
Equity Group	79.35	46.80	31.6%
KCB Group	32.33	45.00	0.1%
EABL	14.76	193.00	49.0%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	18.0%	36.8%	
Foreign Buys %	20.3%	19.9%	
Foreign Buys (KES Mn)	99.67	60.15	39.7%
Foreign Buys (USD Mn)	0.77	0.47	39.6%
Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	5.66	82.38	76.8%
EABL	0.08	14.48	98.0%
Kenya Power	0.71	1.40	28.3%
Equity Group	1.70	1.05	1.3%
Absa (K)	10.52	0.30	0.1%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	-	-	-
Open contracts	304	304	0.0%
Total Value	-	-	-

Top Gainers List			
Counter	19-Feb-25	18-Feb-25	%Δ
Longhorn	3.46	3.15	9.8%
Sanlam Kenya	7.50	6.86	9.3%
Xpress	3.80	3.49	8.9%
Trans-Century	1.42	1.32	7.6%
DTBK	82.25	78.00	5.4%

Top Losers Chart			
Counter	19-Feb-25	18-Feb-25	%Δ
Eaagad	13.00	14.00	-7.1%
Liberty Kenya	7.68	8.00	-4.0%
Car-General	23.05	24.00	-4.0%
Scan-Group	3.35	3.44	-2.6%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	22.61	-102.68	-122.0%
Foreign Sales %	15.7%	53.8%	
Foreign Sales (KES Mn)	77.06	162.83	111.3%
Foreign Sales (USD Mn)	0.60	1.26	111.4%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Equity Group	1.70	49.16	61.9%
Safaricom	5.66	22.38	20.9%
BAT	0.02	5.15	71.2%
Bamburi	0.01	0.23	66.6%
Williamson	0.00	0.06	37.4%

Currency Performance			
	19-Feb-25	18-Feb-25	%Δ
KES/USD	129.3542	129.2803	-0.1%
KES/GBP	163.2385	163.0548	0.0%
KES/EUR	135.2269	135.5245	0.2%
KES/JPY	85.2360	85.3871	0.2%

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Equities Pricelist

	High	Low	19-Feb-25	18-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
AGRICULTURAL								
Eaagads Ltd Ord 1.25 AIMS	13.00	13.00	13.00	14.00	1,900	24,700	-	-
Kakuzi Plc Ord.5.00	434.00	390.00	399.75	396.00	700	279,825	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS	230.00	230.00	230.00	230.00	200	46,000	46,000	-
The Limuru Tea Co. Plc Ord 20.00AIMS	320.00	299.00	309.50	299.00	1,000	309,500	-	-
Sasini Plc Ord 1.00	15.50	15.30	15.45	15.45	5,100	78,795	23,050	-
Williamson Tea Kenya Plc Ord 5.00AIMS	216.75	215.00	215.50	215.50	800	172,400	-	64,500
AUTOMOBILES & ACCESSORIES								
Car & General (K) Ltd Ord 5.00	24.50	22.60	23.05	24.00	4,900	112,945	-	-
BANKING								
ABSA Bank Kenya Plc Ord 0.50	19.20	18.45	19.10	18.50	10,521,700	200,964,470	299,600	-
BK Group Plc Ord 0.80	35.00	35.00	35.00	34.50	100	3,500	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	83.25	80.00	82.25	78.00	44,600	3,668,350	-	32,800
Equity Group Holdings Plc Ord 0.50	46.90	46.60	46.80	46.85	1,695,600	79,354,080	1,050,460	49,163,885
HF Group Plc Ord 5.00	8.00	7.80	7.98	7.70	50,100	399,798	-	-
I&M Group Plc Ord 1.00	35.95	35.15	35.65	35.95	19,800	705,870	-	-
KCB Group Plc Ord 1.00	45.20	44.80	45.00	45.10	718,400	32,328,000	-	40,680
NCBA Group Plc Ord 5.00	50.00	48.90	48.90	49.05	249,100	12,180,990	-	-
Stanbic Holdings Plc ord.5.00	148.50	148.00	148.50	148.00	1,200	178,200	-	-
Standard Chartered Bank Kenya Ltd Ord 5.00	295.00	290.25	293.25	291.50	17,400	5,102,550	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	17.25	16.90	17.05	16.90	159,200	2,714,360	-	-
COMMERCIAL AND SERVICES								
Deacons (East Africa) Plc Ord 2.50AIMS	-	-	0.45	0.45	-	-	-	-
Eveready East Africa Ltd Ord.1.00	1.35	1.29	1.33	1.33	10,700	14,231	-	-
Express Kenya Plc Ord 5.00AIMS	3.80	3.80	3.80	3.49	1,200	4,560	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	5.40	5.30	5.34	5.32	69,000	368,460	-	-
Longhorn Publishers Plc Ord 1.00AIMS	3.46	3.46	3.46	3.15	200	692	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.12	2.03	2.12	2.03	2,100	4,452	-	4,240
Nation Media Group Plc Ord. 2.50	14.05	13.60	13.80	14.05	6,000	82,800	-	-
Sameer Africa Plc Ord 5.00	3.19	2.95	3.12	3.19	700	2,184	-	-
Standard Group Plc Ord 5.00	6.58	6.58	6.58	6.58	200	1,316	-	-
TPS Eastern Africa Ltd Ord 1.00	16.00	16.00	16.00	15.50	100	1,600	-	-
Uchumi Supermarket Plc Ord 5.00	0.30	0.28	0.29	0.28	157,700	45,733	-	-
WPP Scangroup Plc Ord 1.00	3.42	3.25	3.35	3.44	9,900	33,165	-	-
CONSTRUCTION & ALLIED								
ARM Cement Plc Ord 1.00	-	-	5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00	58.00	57.00	57.25	57.25	6,000	343,500	-	228,150
Crown Paints Kenya Plc Ord 5.00	33.00	31.00	31.20	33.00	1,000	31,200	-	-
E.A.Cables Ltd Ord 0.50	2.48	2.24	2.43	2.48	136,700	332,181	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	36.00	35.00	35.00	35.25	7,800	273,000	-	-
ENERGY & PETROLEUM								
KenGen Co. Plc Ord. 2.50	4.85	4.60	4.74	4.78	794,400	3,765,456	-	-
Kenya Power & Lighting Co Plc Ord 2.50	7.04	6.92	7.00	7.00	708,700	4,960,900	1,400,000	-
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	23.00	22.50	22.65	22.55	2,600	58,890	-	-
Umeme Ltd Ord 0.50	16.65	16.50	16.65	16.65	107,200	1,784,880	-	-
INSURANCE								
Britam Holdings Plc Ord 0.10	7.72	7.02	7.24	7.02	68,400	495,216	-	4,500
CIC Insurance Group Ltd Ord.1.00	2.90	2.66	2.82	2.79	136,800	385,776	-	-
Jubilee Holdings Ltd Ord 5.00	202.00	201.50	202.00	200.00	3,000	606,000	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.71	1.68	1.69	1.69	3,269,100	5,524,779	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	7.90	7.20	7.68	8.00	15,500	119,040	-	-
Sanlam Kenya Plc Ord 5.00	7.50	7.50	7.50	6.86	800	6,000	-	-
INVESTMENT								
Centum Investment Co Plc Ord 0.50	12.45	11.35	12.40	11.90	12,200	151,280	-	-
Home Afrika Ltd Ord 1.00GEMS	1.00	0.90	0.95	0.96	1,415,100	1,344,345	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.50	3.28	3.45	3.28	1,300	4,485	-	-
Trans-Century Plc Ord 0.50AIMS	1.45	1.30	1.42	1.32	567,800	806,276	-	-
INVESTMENT SERVICES								
Nairobi Securities Exchange Plc Ord 4.00	6.72	6.70	6.70	6.52	5,300	35,510	-	-

MANUFACTURING & ALLIED	High	Low	19-Feb-25	18-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00	81.00	80.25	80.75	80.75	200	16,150	-	-
British American Tobacco Kenya Plc Ord 10.00	365.00	362.50	364.75	365.00	19,800	7,222,050	-	5,145,000
Carbacid Investments Plc Ord 1.00	21.90	21.60	21.85	21.90	16,300	356,155	-	-
East African Breweries Plc Ord 2.00	195.00	190.00	193.00	192.00	76,500	14,764,500	14,475,000	-
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.60	1.45	1.54	1.51	12,200	18,788	-	-
Kenya Orchards Ltd Ord 5.00AIMS	-	-	56.50	56.50	-	-	-	-
Mumias Sugar Co. Ltd Ord 2.00	-	-	0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	20.50	20.50	20.50	20.50	200	4,100	-	-
TELECOMMUNICATION	High	Low	19-Feb-25	18-Feb-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	19.40	18.80	18.95	18.70	5,656,100	107,183,095	82,378,805	22,378,270
REAL ESTATE INVESTMENT TRUST	High	Low	19-Feb-25	18-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	19-Feb-25	18-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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