

Daily Market Wrap

- NSE equities' prices were down 1.2% on Wednesday, January 29, 2025, despite a 17.6% rise in market activity. NSE 10 as NSE 25 shed 0.7% each as NSE 20 gained 0.2%. This is even as we expect market activity to improve in the remaining two days of January on end month book closures by the corporates.
- The telecommunication, the banking and the manufacturing sectors remained the day's top movers with turnovers of KES 245.91Mn, KES 209.71Mn and KES 70.85Mn respectively, to account for 95.9% of the total market value.
- Foreign participation improved from 56.3% to 77.7% with a reduced net foreign outflows on improved inflows.
- Safaricom retained the top mover position with KES 245.91Mn value from 13.44Mn shares of KES 18.30 average price per share. The telco giant lost 2.9% from KES 18.85 to KES 18.30 per share on increased foreign exits from the counter in the day.
- Banks took second mover position led by Stanbic with KES 89.09Mn value from 640,900 shares. Overall banking stocks lost 0.3% losses on HF Group, NCBA and KCB which lost 4.1%, 1.5% and 1.0% respectively, find below price movements.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,360.17	1,370.37	-0.7%
N20 Share Index	2,194.57	2,190.92	0.2%
NSE 25 Share Index	3,544.38	3,569.94	-0.7%
NASI	130.66	132.28	-1.2%
Mkt Capitalization(Bn)	2,052.44	2,077.93	-1.2%
Volumes Traded (Mn)	29.31	24.92	17.6%
Equities Turnover (Mn)	549.14	590.60	-7.0%
Bonds Turnover(Mn)	5,233.25	6,626.50	-21.0%
Day's Top Movers			
Counter	Turnovers (KES Mn)	Price	Av. Foreign %
Safaricom	245.91	18.30	96.1%
Stanbic	89.09	139.00	96.0%
EABL	69.83	195.00	95.8%
Equity Group	52.14	48.35	70.9%
KCB Group	24.85	44.65	18.2%
Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	77.7%	56.3%	
Foreign Buys %	76.9%	27.6%	
Foreign Buys (KES Mn)	428.41	152.24	64.5%
Foreign Buys (USD Mn)	3.31	1.18	64.5%
Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	13.44	232.78	94.7%
Stanbic	0.64	87.57	98.3%
EABL	0.36	69.57	99.7%
Equity Group	1.08	38.09	73.1%
Kenya Airways	0.43	0.27	11.7%
Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	1	1	0.0%
Open contracts	328	328	0.0%
Total Value	45,010	45,010	0.00%

Top Gainers List			
Counter	29-Jan-25	28-Jan-25	%Δ
Home Africa	0.58	0.53	9.4%
Cables	2.05	1.90	7.9%
Xpress	3.50	3.25	7.7%
Trans-Century	1.12	1.05	6.7%
Centum	11.90	11.35	4.8%

Top Losers Chart			
Counter	29-Jan-25	28-Jan-25	%Δ
Sameer	2.57	2.71	-5.2%
Portland cement	27.45	28.85	-4.9%
NBV	2.11	2.21	-4.5%
HF Group	6.98	7.28	-4.1%
Britam	8.16	8.46	-3.5%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-9.47	-316.46	-97.0%
Foreign Sales %	78.6%	85.0%	
Foreign Sales (KES Mn)	437.87	468.70	7.0%
Foreign Sales (USD Mn)	3.39	3.63	7.0%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	13.44	239.39	97.4%
Stanbic	0.64	83.40	93.6%
EABL	0.36	64.14	91.9%
Equity Group	1.08	35.79	68.7%
KCB Group	0.56	8.97	36.1%

Currency Performance			
	29-Jan-25	28-Jan-25	%Δ
KES/USD	129.2463	129.2533	0.0%
KES/GBP	160.5950	160.7976	0.0%
KES/EUR	134.7780	134.8113	0.0%
KES/JPY	83.1407	82.9258	-0.3%

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Equities Pricelist

AGRICULTURAL	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	-	-	13.50	13.50	-	-	-	-
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	15.25	15.00	15.05	15.00	7,200	108,360	-	-
Williamson Tea Kenya Plc Ord 5.00AIMS	215.00	214.00	214.75	214.00	500	107,375	-	-
AUTOMOBILES & ACCESSORIES	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	-	-	24.70	24.70	-	-	-	-
BANKING	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	18.50	17.65	17.95	17.90	124,100	2,227,595	-	-
BK Group Plc Ord 0.80	36.00	35.00	35.85	34.40	2,400	86,040	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	70.00	69.50	69.50	69.50	115,100	7,999,450	-	5,424,750
Equity Group Holdings Plc Ord 0.50	48.55	48.00	48.35	48.50	1,078,300	52,135,805	38,089,355	35,785,050
HF Group Plc Ord 5.00	7.50	6.56	6.98	7.28	2,299,500	16,050,510	-	-
I&M Group Plc Ord 1.00	35.15	34.90	35.00	35.15	235,900	8,256,500	-	-
KCB Group Plc Ord 1.00	45.00	44.10	44.65	45.10	556,500	24,847,725	57,920	8,971,500
NCBA Group Plc Ord 5.00	49.50	48.00	48.75	49.50	18,800	916,500	68,600	-
Stanbic Holdings Plc ord.5.00	140.00	139.00	139.00	139.25	640,900	89,085,100	87,570,000	83,400,450
Standard Chartered Bank Kenya Ltd Ord 5.00	283.00	280.00	281.50	283.00	10,900	3,068,350	-	-
The Co-operative Bank of Kenya Ltd Ord 1.00	16.70	16.30	16.45	16.40	306,400	5,040,280	-	-
COMMERCIAL AND SERVICES	High	Low	29-Jan-25	28-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	1.25	1.13	1.22	1.25	5,300	6,466	-	-
Express Kenya Plc Ord 5.00AIMS	3.50	3.50	3.50	3.25	1,900	6,650	-	-
Homeboyz Entertainment Plc 0.50GEMS	-	-	4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	5.50	5.30	5.36	5.42	425,000	2,278,000	266,000	-
Longhorn Publishers Plc Ord 1.00AIMS	2.80	2.78	2.80	2.74	26,600	74,480	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.11	2.11	2.11	2.21	25,000	52,750	-	52,750
Nation Media Group Plc Ord. 2.50	14.00	13.10	13.80	13.30	50,900	702,420	-	-
Sameer Africa Plc Ord 5.00	2.79	2.50	2.57	2.71	4,500	11,565	-	-
Standard Group Plc Ord 5.00	5.00	4.95	4.98	5.04	14,600	72,708	-	72,735
TPS Eastern Africa Ltd Ord 1.00	15.00	15.00	15.00	14.90	6,800	102,000	-	-
Uchumi Supermarket Plc Ord 5.00	0.26	0.23	0.25	0.24	961,500	240,375	-	-
WPP Scangroup Plc Ord 1.00	2.97	2.82	2.85	2.81	500	1,425	-	-
CONSTRUCTION & ALLIED	High	Low	29-Jan-25	28-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	57.00	57.00	57.00	58.00	36,700	2,091,900	-	638,400
Crown Paints Kenya Plc Ord 5.00	30.00	30.00	30.00	30.20	500	15,000	-	-
E.A.Cables Ltd Ord 0.50	2.09	1.95	2.05	1.90	149,400	306,270	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	28.00	26.35	27.45	28.85	300	8,235	-	-
ENERGY & PETROLEUM	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	4.13	4.06	4.08	4.10	326,200	1,330,896	-	7,434
Kenya Power & Lighting Co Plc Ord 2.50	6.68	6.30	6.44	6.36	579,100	3,729,404	-	-
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	21.50	21.00	21.10	21.25	2,600	54,860	-	-
Umeme Ltd Ord 0.50	16.95	16.90	16.90	17.05	9,400	158,860	-	-
INSURANCE	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	8.46	8.08	8.16	8.46	38,100	310,896	-	-
CIC Insurance Group Ltd Ord.1.00	2.78	2.64	2.70	2.65	239,100	645,570	278	-
Jubilee Holdings Ltd Ord 5.00	-	-	205.00	205.00	-	-	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.74	1.68	1.70	1.71	3,991,600	6,785,720	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	7.38	6.40	6.56	6.74	1,900	12,464	-	-
Sanlam Kenya Plc Ord 5.00	6.48	6.18	6.28	6.32	23,200	145,696	-	-
INVESTMENT	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	12.20	11.00	11.90	11.35	3,800	45,220	-	-
Home Afrika Ltd Ord 1.00GEMS	0.58	0.58	0.58	0.53	163,700	94,946	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS	-	-	1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.30	3.07	3.27	3.32	7,200	23,544	-	-
Trans-Century Plc Ord 0.50AIMS	1.15	1.08	1.12	1.05	2,903,900	3,252,368	-	-

INVESTMENT SERVICES	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	6.68	6.26	6.46	6.44	4,400	28,424	-	-
MANUFACTURING & ALLIED	High	Low	29-Jan-25	28-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	368.25	368.00	368.00	368.25	1,100	404,800	-	-
Carbacid Investments Plc Ord 1.00	20.00	19.50	19.90	19.70	21,800	433,820	-	-
East African Breweries Plc Ord 2.00	195.00	192.00	195.00	194.00	358,100	69,829,500	69,572,800	64,135,000
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.55	1.28	1.47	1.41	88,500	130,095	-	-
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	22.10	19.00	19.55	20.10	2,800	54,740	-	-
TELECOMMUNICATION	High	Low	29-Jan-25	28-Jan-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	18.85	17.00	18.30	18.85	13,437,700	245,909,910	232,782,460	239,386,210
REAL ESTATE INVESTMENT TRUST	High	Low	29-Jan-25	28-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	29-Jan-25	28-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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