

Daily Market Wrap

- Equities' prices further recorded losses on Tuesday, March 18, 2025, shedding 0.3% on average. NSE 20 stocks lost the most at 0.5% followed by NSE 25 and NSE 10 with 0.2% and 0.1% losses respectively. As a result, the market capitalization lost 0.3% to KES 2,041.72Bn.
- Value traded dipped 69.3% to KES 585.01Mn on low volumes traded, in relation to 89.80Mn shares of KES 750.92Mn traded on Monday.
- Foreign participation however jumped up to 46.7% with a reduced net foreign outflow of KES 24.86Mn compared to an average of 10.5% of KES 69.47Mn recorded on Monday, 17th March 2025.
- Equity Group emerged the day's top mover after trading KES 260.06Mn from 5.49Mn shares supported by expectations of better returns on its upcoming earnings for FY2025. This was even as the counter's price lost 0.3% from KES 47.55 to KES 47.40 per share on what appeared to be elevated foreign outflows.
- Safaricom came second with KES 216.09Mn after exchanging 12.21Mn shares at a discounted price of KES 17.70 per share supported by increased foreign inflows. The telco's foreign inflows improved to 84.4% of all the buys transactions to overweigh the foreign sales which stood at 64.2% of all its sales transactions.
- Secondary bonds value traded declined marginally at 2.5% from KES 13.67Bn to KES 13.34Bn.

Find below table and pricelist for more:

Market Indicators			
Indicator	Current Value	Previous Value	%Δ
N10 Share Index	1,348.16	1,350.02	-0.1%
N20 Share Index	2,241.35	2,252.25	-0.5%
NSE 25 Share Index	3,552.28	3,558.32	-0.2%
NASI	129.90	130.35	-0.3%
Mkt Capitalization(Bn)	2,041.72	2,048.88	-0.3%
Volumes Traded (Mn)	27.59	89.80	-69.3%
Equities Turnover (Mn)	585.01	750.92	-22.1%
Bonds Turnover(Mn)	13,335.10	13,674.70	-2.5%

Day's Top Movers			
	Turnovers (KES Mn)	Price	Av. Foreign %
Equity Group	260.06	47.40	36.2%
Safaricom	216.09	17.70	74.3%
Stanbic	28.26	161.75	49.8%
Kengen	14.02	5.04	0.0%
KCB Group	10.21	42.45	0.0%

Foreign Activity Summary			
Transaction	Current Value	Previous Value	%Δ
Foreign Activity %	46.7%	10.5%	
Foreign Buys %	44.6%	5.8%	
Foreign Buys (KES Mn)	260.86	43.89	83.2%
Foreign Buys (USD Mn)	2.02	0.34	83.2%

Top Foreign Buys (KES Mn)			
Counter	Volumes (Mn)	Foreign Buy	%Δ
Safaricom	12.21	182.63	84.4%
Equity Group	5.49	72.17	27.7%
DTBK	0.07	3.04	56.5%
StanChart	0.02	1.03	19.1%
Stanbic	0.17	0.95	3.4%

Derivatives Market			
Transaction	Current	Previous	% Change
Contracts closed	-	-	-
Open contracts	245	245	0.0%
Total Value	-	-	-

Top Gainers List			
Counter	18-Mar-25	17-Mar-25	%Δ
Portland cement	42.00	39.00	7.7%
Centum	13.00	12.30	5.7%
Absa New Gold	3,635.00	3,455.00	5.2%
Liberty Kenya	7.32	7.10	3.1%
Britam	7.88	7.66	2.9%

Top Losers Chart			
Counter	18-Mar-25	17-Mar-25	%Δ
Car-General	22.05	24.50	-10.0%
CIC Group	2.74	3.00	-8.7%
Home Africa	0.77	0.81	-4.9%
Standard Group	5.88	6.18	-4.9%
NBV	1.97	2.07	-4.8%
Cables	2.14	2.24	-4.5%

Foreign Activity (summary continued)			
Transaction	Current Value	Previous Value	%Δ
Net Foreign (KES Mn)	-24.86	-69.47	-64.2%
Foreign Sales %	48.8%	15.1%	
Foreign Sales (KES Mn)	285.72	113.36	-60.3%
Foreign Sales (USD Mn)	2.21	0.88	-60.3%

Top Foreign Sales (KES Mn)			
Counter	Volumes (Mn)	Foreign Sales	%Δ
Safaricom	12.21	138.95	64.2%
Equity Group	5.49	116.28	44.7%
Stanbic	0.17	27.23	96.3%
BAT	0.00	1.44	83.0%
Kenya Airways	0.38	1.05	54.0%

Currency Performance			
	18-Mar-25	17-Mar-25	%Δ
KES/USD	129.3933	129.5105	0.1%
KES/GBP	167.9202	167.4053	0.0%
KES/EUR	141.1681	140.8880	-0.2%
KES/JPY	86.4726	87.2271	0.9%

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Equities Pricelist

AGRICULTURAL	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Eaagads Ltd Ord 1.25 AIMS	12.90	12.90	12.90	12.90	800	10,320	-	-
Kakuzi Plc Ord.5.00			400.00	400.00	-	-	-	-
Kapchorua Tea Kenya Plc Ord Ord 5.00AIMS			226.00	226.00	-	-	-	-
The Limuru Tea Co. Plc Ord 20.00AIMS			320.00	320.00	-	-	-	-
Sasini Plc Ord 1.00	16.00	15.40	15.85	15.70	8,700	137,895	-	86,030
Williamson Tea Kenya Plc Ord 5.00AIMS	225.00	225.00	225.00	226.75	200	45,000	-	-
AUTOMOBILES & ACCESSORIES	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Car & General (K) Ltd Ord 5.00	22.05	22.05	22.05	24.50	3,000	66,150	-	-
BANKING	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA Bank Kenya Plc Ord 0.50	19.30	18.00	19.00	19.05	158,300	3,007,700	-	57,000
BK Group Plc Ord 0.80	35.00	35.00	35.00	35.10	2,800	98,000	-	-
Diamond Trust Bank Kenya Ltd Ord 4.00	81.75	80.00	80.00	81.50	67,200	5,376,000	3,040,000	400,200
Equity Group Holdings Plc Ord 0.50	47.80	46.80	47.40	47.55	5,486,500	260,060,100	72,173,100	116,276,885
HF Group Plc Ord 5.00	7.56	7.20	7.38	7.56	21,100	155,718	-	-
I&M Group Plc Ord 1.00	35.00	34.50	34.85	34.95	6,800	236,980	-	-
KCB Group Plc Ord 1.00	42.95	42.00	42.45	42.25	240,500	10,209,225	-	-
NCBA Group Plc Ord 5.00	53.00	51.00	52.00	52.25	48,300	2,511,600	41,800	-
Stanbic Holdings Plc ord.5.00	165.00	160.75	161.75	160.75	174,700	28,257,725	949,900	27,225,925
Standard Chartered Bank Kenya Ltd Ord 5.00	275.00	265.50	270.50	272.00	19,900	5,382,950	1,026,000	-
The Co-operative Bank of Kenya Ltd Ord 1.00	17.80	16.00	16.45	16.55	537,300	8,838,585	4,920	57,750
COMMERCIAL AND SERVICES	High	Low	18-Mar-25	17-Mar-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	1.33	1.20	1.23	1.22	14,800	18,204	-	-
Express Kenya Plc Ord 5.00AIMS			3.96	3.96	-	-	-	-
Homeboyz Entertainment Plc 0.50GEMS			4.66	4.66	-	-	-	-
Kenya Airways Ltd Ord 1.00	5.22	4.96	5.16	5.22	376,600	1,943,256	-	1,050,400
Longhorn Publishers Plc Ord 1.00AIMS	3.30	3.00	3.13	3.27	2,100	6,573	-	-
Nairobi Business Ventures Plc Ord. 0.50GEMS	2.10	1.94	1.97	2.07	30,300	59,691	-	46,410
Nation Media Group Plc Ord. 2.50	14.00	13.50	13.80	14.20	14,500	200,100	-	-
Sameer Africa Plc Ord 5.00	3.65	3.50	3.52	3.52	24,700	86,944	-	-
Standard Group Plc Ord 5.00	5.88	5.88	5.88	6.18	100	588	-	-
TPS Eastern Africa Ltd Ord 1.00	15.40	15.00	15.00	15.70	5,100	76,500	-	-
Uchumi Supermarket Plc Ord 5.00	0.35	0.30	0.32	0.33	663,000	212,160	-	-
WPP Scangroup Plc Ord 1.00	3.32	3.00	3.04	3.02	11,400	34,656	-	-
CONSTRUCTION & ALLIED	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ARM Cement Plc Ord 1.00			5.55	5.55	-	-	-	-
Bamburi Cement Plc Ord 5.00			56.50	56.50	-	-	-	-
Crown Paints Kenya Plc Ord 5.00			33.50	33.50	-	-	-	-
E.A.Cables Ltd Ord 0.50	2.25	2.12	2.14	2.24	46,600	99,724	-	-
E.A.Portland Cement Co. Ltd Ord 5.00	42.00	42.00	42.00	39.00	500	21,000	-	-
ENERGY & PETROLEUM	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
KenGen Co. Plc Ord. 2.50	5.20	5.00	5.04	5.04	2,782,000	14,021,280	-	-
Kenya Power & Lighting Co Plc Ord 2.50	6.54	6.30	6.32	6.44	1,302,800	8,233,696	359,730	63,400
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	24.00	23.00	23.65	24.00	5,900	139,535	46,000	-
Umeme Ltd Ord 0.50	17.00	16.30	16.65	16.90	18,300	304,695	-	-

INSURANCE	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Britam Holdings Plc Ord 0.10	8.20	7.50	7.88	7.66	290,400	2,288,352	69,980	68,456
CIC Insurance Group Ltd Ord.1.00	2.90	2.70	2.74	3.00	174,700	478,678	-	-
Jubilee Holdings Ltd Ord 5.00	216.00	216.00	216.00	221.00	5,100	1,101,600	-	-
Kenya Re Insurance Corporation Ltd Ord 2.50	1.94	1.85	1.89	1.94	1,256,300	2,374,407	-	-
Liberty Kenya Holdings Ltd Ord. 1.00	7.32	7.30	7.32	7.10	1,294,700	9,477,204	-	-
Sanlam Kenya Plc Ord 5.00	8.58	8.46	8.58	8.42	1,400	12,012	-	-
INVESTMENT	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Centum Investment Co Plc Ord 0.50	13.50	12.20	13.00	12.30	30,600	397,800	-	-
Home Afrika Ltd Ord 1.00GEMS	0.82	0.75	0.77	0.81	76,100	58,597	-	-
Kurwitu Ventures Ltd Ord 100.00GEMS			1,500.00	1,500.00	-	-	-	-
Olympia Capital Holdings Ltd Ord 5.00	3.17	3.17	3.17	3.17	100	317	-	-
Trans-Century Plc Ord 0.50AIMS	1.32	1.22	1.28	1.28	90,000	115,200	-	-
INVESTMENT SERVICES	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Nairobi Securities Exchange Plc Ord 4.00	7.00	6.60	6.80	6.86	6,000	40,800	-	-
MANUFACTURING & ALLIED	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
B.O.C Kenya Plc Ord 5.00			84.00	84.00	-	-	-	-
British American Tobacco Kenya Plc Ord 10.00	370.00	369.50	369.75	369.50	4,700	1,737,825	517,650	1,442,650
Carbacid Investments Plc Ord 1.00	20.00	19.80	19.95	20.00	12,700	253,365	-	-
East African Breweries Plc Ord 2.00	189.75	186.00	187.00	186.00	700	130,900	-	-
Flame Tree Group Holdings Ltd Ord 0.825GEMS	1.23	1.12	1.21	1.20	64,100	77,561	-	-
Kenya Orchards Ltd Ord 5.00AIMS			51.00	51.00	-	-	-	-
Mumias Sugar Co. Ltd Ord 2.00			0.27	0.27	-	-	-	-
Unga Group Ltd Ord 5.00	23.70	23.70	23.70	23.70	100	2,370	-	-
TELECOMMUNICATION	High	Low	18-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
Safaricom Plc Ord 0.05	17.90	17.50	17.70	17.80	12,208,600	216,092,220	182,632,600	138,947,540
REAL ESTATE INVESTMENT TRUST	High	Low	18-Mar-25	17-Mar-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-Mar-25	17-Mar-25	Volume	Value Traded	Foreign Buys	Foreign Sales
ABSA New Gold ETF	3635i	3635i	3,635.00	3,455.00	-	-	-	-

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