

Daily Market Wrap

- **Market Indicators:** The equities market was bullish on 9th September 2025 with the NASI gaining 0.40% to close at 177.52 points. The NSE 20 rose 0.87% to 3,001.82, while the NSE 25 climbed 0.80% to 4,593.02. Market capitalization improved to Kes. 2.80Trn from Kes. 2.79Trn. Equity turnover increased by 21.87% to Kes. 711.13Mn despite a 31.51% drop in volumes traded to 28.84Mn shares.
- **Gainers/Losers:** Shri Krishna Overseas emerged as the day's top gainer, surging 9.91% to Kes. 7.54. It was followed by Kenya Re, which gained 9.67% to Kes. 3.29 on sustained interest in insurance counters. Express Kenya rose 8.33% to Kes. 9.88, continuing its strong momentum. On the flipside, Standard Group was the worst performer, sliding 7.10% to Kes. 5.76 on weak investor sentiment. CIC Insurance dropped 4.32% to Kes. 5.32, while Nairobi Business Ventures shed 4.27% to Kes. 1.57, extending its recent declines.
- **Top Movers:** Trading activity was led by Co-op Bank Group, which posted the highest turnover at Kes. 175.02Mn, reflecting strong institutional demand. Safaricom followed with Kes. 155.12Mn, maintaining its position as a key market driver. KCB Group came in third with Kes. 70.70Mn, highlighting continued activity in the banking sector.
- **Foreigners' Participation:** Foreign investors were most active in Safaricom, recording Kes. 134.77Mn in buys against Kes. 114.42Mn in sells, resulting in a net inflow of Kes. 20.35Mn. BAT followed with Kes. 14.64Mn in buys, translating to a strong net inflow of Kes. 14.27Mn. Other inflows were noted in KenGen (Kes. 1.82Mn), and StanChart (Kes. 0.42Mn). On the outflow side, Stanbic led with Kes. -2.99Mn, followed by Equity Group (-Kes. 2.80Mn) and Kenya Airways (-Kes. 2.51Mn).
- **Bonds Market:** The secondary bonds market recorded improved activity with turnover rising to Kes. 7.82Bn from Kes. 5.46Bn in the previous session, while the number of deals increased to 226 from 112, reflecting stronger investor participation.
- **Market Update:** The Nairobi Securities Exchange (NSE) was ranked as the third-best performer for foreign investors among ten African markets monitored by the Morgan Stanley Capital International (MSCI) frontier and emerging market indices, buoyed by a recent rally in blue-chip stocks. Year-to-date analysis shows Kenya delivering returns of 38.40%, behind Morocco at 50.20% and Nigeria at 39.30%.

Market Activity Summary Tables

Market Indicators			
Indicator	08-Sep	09-Sep	%Change
NSE10 Share Index	1754.62	1772.82	1.04%
NSE20 Share Index	2975.81	3001.82	0.87%
NSE25 Share Index	4556.57	4593.02	0.80%
NASI	176.82	177.52	0.40%
Mkt Capitalization (Bn)	2785.76	2796.84	0.40%
Volumes Traded (Mn)	42.11	28.84	-31.51%
Equities Turnover (Mn)	583.53	711.13	21.87%
Bonds Turnover (Bn)	5.46	7.82	43.22%

Top Gainers			
Stock	Share Price 08-Sep	Share Price 9-Sep	%Change
Shri Krishna Overseas	6.86	7.54	9.91%
Kenya Re	3.00	3.29	9.67%
Express Kenya	9.12	9.88	8.33%
Home Afrika	1.47	1.59	8.16%
Flame Tree Group	5.18	5.54	6.95%

Top Movers			
Stock	Share Price 8-Sep	Share Price 9-Sep	Mkt Turnover (Kes. Mn)
Co-op Bank Group	21.00	21.45	175.02
Safaricom	29.25	29.10	155.12
StanChart Bank	292.75	299.25	79.46
KCB Group	51.25	51.75	70.70
Equity Group	55.00	55.25	49.17

Top Losers			
Stock	Share Price 05-Sep	Share Price 8-Sep	%Change
Standard Group	6.20	5.76	-7.10%
CIC Insurance	5.56	5.32	-4.32%
Nairobi B. Ventures	1.64	1.57	-4.27%
Britam Holdings	8.88	8.58	-3.38%
BK Group	38.65	37.50	-2.98%

Top Foreign Buys		
Stock	Share Price 9-Sep	Foreign Buys (Kes. Mn)
Safaricom	29.09	134.77
BAT	444.81	14.64
Equity Group	55.31	10.05
KenGen	10.10	1.82
Stan Chart Group	299.13	0.42

Top Foreign Sells		
Stock	Share Price 9-Sep	Foreign Sells (Kes. Mn)
Safaricom	29.09	114.42
Equity Group	55.31	12.85
Stanbic Holdings	181.65	2.99
Kenya Airways	4.38	2.51
KCB Group	51.69	1.93

Top Foreign Net Inflows		
Stock	Share Price 9-Sep	Net Inflows (Kes. Mn)
Safaricom	29.09	20.35
BAT	444.81	14.27
KenGen	10.10	1.82
Stan Chart Group	299.13	0.42
CIC Insurance Group	5.33	0.03

Top Foreign Net Outflows		
Stock	Share Price 9-Sep	Net Outflows (Kes. Mn)
Stanbic Holdings	181.65	-2.99
Equity Group	55.31	-2.80
Kenya Airways	4.38	-2.51
KCB Group	51.69	-1.93
I&M Group	42.09	-1.75

MARKET SUMMARY

SECTOR	Share Price 08-Sep	Share Price 09-Sep	%Change	YTD % Change	Market Turnover (Kes. Mn)
AGRICULTURAL					
Eaagads Ltd	19.55	19.60	0.26%	63.33%	0.10
Kakuzi Plc	423.00	423.00	0.00%	7.77%	0.02
Kapchorua Tea Kenya	327.00	320.50	-1.99%	33.96%	0.11
The Limuru Tea Co. Plc	310.00	310.00	0.00%	-11.43%	0.00
Sasini Plc	18.00	18.10	0.56%	20.67%	1.35
Williamson Tea Kenya Plc	245.00	245.00	0.00%	9.01%	0.58
AUTOMOBILES & ACCESSORIES					
Car & General (K) Ltd	33.50	34.60	3.28%	38.40%	0.22
BANKING					
ABSA Group	20.80	21.70	4.33%	15.12%	12.68
BK Group	38.65	37.50	-2.98%	7.14%	0.24
DTB Group	104.75	105.00	0.24%	57.30%	32.05
Equity Group	55.00	55.25	0.45%	15.10%	49.17
HF Group	11.00	11.00	0.00%	139.13%	23.36
I&M Group	41.20	42.10	2.18%	16.94%	7.97
KCB Group	51.25	51.75	0.98%	22.05%	70.70
NCBA Group	68.50	68.25	-0.36%	33.82%	4.60
Stanbic Holdings	183.75	181.75	-1.09%	30.05%	12.16
StanChart Bank Kenya	292.75	299.25	2.22%	4.91%	79.46
Co-op Bank Group	21.00	21.45	2.14%	22.92%	175.02
COMMERCIAL AND SERVICES					
Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.36	1.36	0.00%	16.24%	0.11
Express Kenya	9.12	9.88	8.33%	174.44%	0.40
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	4.40	4.38	-0.45%	14.36%	4.72
Longhorn Publishers	2.82	2.96	4.96%	28.70%	0.14
Nairobi Business Ventures	1.64	1.57	-4.27%	-21.89%	0.48
Nation Media Group	13.45	13.50	0.37%	-6.25%	0.53
Sameer Africa	15.75	15.85	0.63%	549.59%	0.58
Standard Group	6.20	5.76	-7.10%	15.43%	0.02
TPS Eastern Africa Ltd	15.25	15.15	-0.66%	-4.42%	0.03

Uchumi Supermarket	0.31	0.31	0.00%	93.75%	0.14
WPP					
Scangroup	2.89	3.00	3.81%	19.52%	0.50

CONSTRUCTION & ALLIED

ARM Cement Plc	5.55	5.55	0.00%	0.00%	0.00
Bamburi Cement	54.00	54.00	0.00%	-1.82%	0.00
Crown Paints Kenya	50.25	50.00	-0.50%	47.49%	0.13
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00
E.A.Portland Cement	54.75	54.50	-0.46%	87.61%	0.06

ENERGY & PETROLEUM

KenGen Co.	10.05	10.10	0.50%	169.33%	18.82
KPLC Ord 2.50	14.10	14.50	2.84%	179.92%	17.92
KPLC 4% Pref 20.00	4.10	4.10	0.00%	2.50%	0.00
KPLC 7% Pref 20.00	6.00	6.00	0.00%	0.00%	0.00
TotalEnergies Marketing Kenya	35.35	37.60	6.36%	84.77%	0.41
Umeme Ltd	10.20	10.10	-0.98%	-39.52%	2.16

INSURANCE

Britam					
Holdings	8.88	8.58	-3.38%	47.42%	2.97
CIC Insurance Group	5.56	5.32	-4.32%	148.60%	1.37
Jubilee Holdings Ltd	310.75	319.75	2.90%	82.98%	0.26
Kenya Re	3.00	3.29	9.67%	143.70%	5.31
Liberty Kenya Holdings	11.40	11.20	-1.75%	67.16%	0.16
Sanlam Kenya	8.52	8.68	1.88%	75.35%	0.13

INVESTMENT

Centum Investment	13.60	13.90	2.21%	36.27%	2.68
Home Afrika Ltd	1.47	1.59	8.16%	329.73%	1.18
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.54	5.42	-2.17%	92.88%	0.01
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

INVESTMENT SERVICES

Nairobi Securities Exchange	15.60	15.60	0.00%	164.41%	0.59
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MANUFACTURING & ALLIED

B.O.C Kenya	129.50	129.50	0.00%	45.92%	0.20
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BAT Kenya	435.25	444.75	2.18%	18.21%	17.78
Carbacid Investments	24.80	24.95	0.60%	22.60%	1.71
EABL	221.75	224.00	1.01%	27.64%	2.81
Flame Tree Group	1.50	1.60	6.67%	66.67%	0.49
Africa Mega Agricorp	72.00	72.00	0.00%	2.86%	0.00
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	20.00	20.50	2.50%	36.67%	0.05
Shri Krishana Overseas	6.86	7.54	9.91%	27.80%	1.29

TELECOMMUNICATION

Safaricom	29.25	29.10	-0.51%	69.19%	155.12
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REAL ESTATE INV. TRUST

LAPTRUST IMARA I-REIT	20.00	20.00	0.00%	0.00%	0.00
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EXCHANGE TRADED FUNDS

ABSA New Gold ETF	4275.00	4275.00	0.00%	31.13%	0.00
Satrix MSCI World Feeder ETF	817.00	797.00	-2.45%	4.73%	1.35

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