

Daily Market Wrap

- The stock market experienced a slight increase in stock prices. The overall prices (NASI) increased by 0.02% on average with all the tracking indicators recording gains.
- The equities turnover increased by 160.97% from Kes. 141.51Mn on 11th August 2025 to Kes. 369.30Mn on 12th August 2025. The volumes traded during the day increased by 120.52% from 6.58Mn shares to 14.51 Mn shares.
- The market focus turned on Banking, Telecommunication, and Manufacturing and allied sectors transacting Kes. 229.94Mn, Kes. 58.84Mn, and Kes. 51.97Mn of market turnover respectively.
- Equity Group, Safaricom, and KCB Group topped in the top movers list after transacting Kes. 142.23Mn, Kes. 58.84Mn, and Kes. 55.39Mn respectively.
- Absa Bank Kenya Plc reported a 9% Y-Y increase in profit after tax to Kes. 11.70Bn for the period H1, 2025. The total assets increased by 10.40% as non-interest income grew 3.30% cancelling out a 2.90% decrease in interest income. The bank's half-year financial performance was largely attributed to effective cost management, efficiency in operations, and digitization efforts. The Board of directors approved an interim dividend payment of Kes. 0.20 per share to be paid on or about 15th October 2025.
- The Treasury aims at raising Kes. 100Bn by selling a stake in Kenya Pipeline Company (KPC) after privatization via an IPO on the Nairobi Stock Exchange. The IPO will become the largest issuance in the region since 2008.

| Market Indicators | | | |
|-------------------------|---------|---------|----------|
| Indicator | 11-Aug | 12-Aug | % Change |
| NSE10 Share Index | 1597.69 | 1602.12 | 0.28% |
| NSE20 Share Index | 2590.7 | 2607.39 | 0.64% |
| NSE25 Share Index | 4201.88 | 4209.58 | 0.18% |
| NASI | 162.18 | 162.22 | 0.02% |
| Mkt Capitalization (Bn) | 2555.06 | 2555.71 | 0.03% |
| Volumes Traded (Mn) | 6.58 | 14.51 | 120.52% |
| Equities Turnover (Mn) | 141.51 | 369.30 | 160.97% |

| Top Movers | | | |
|---------------|-------------|-----------|-----------------|
| Stock | Price (Kes) | Volume | Value (Kes. Mn) |
| Equity Group | 52.75 | 2,696,345 | 142.23 |
| Safaricom Plc | 26.3 | 2,237,335 | 58.84 |
| KCB Group | 48.5 | 1,142,044 | 55.39 |
| EABL | 208 | 122,836 | 25.55 |
| BAT | 429 | 34,126 | 14.64 |

| Top Gainers | | | |
|------------------------------|--------|--------|---------|
| Stock | 11-Aug | 12-Aug | %Change |
| Express Kenya Plc | 4.09 | 4.49 | 9.78% |
| Eveready East Africa Ltd | 1.13 | 1.24 | 9.73% |
| Sameer Africa Plc | 13.75 | 14.85 | 8.00% |
| HF Group Plc | 7.5 | 8.04 | 7.20% |
| Olympia Capital Holdings Ltd | 5.72 | 6.02 | 5.24% |

| Top Losers | | | |
|----------------------------|--------|--------|----------|
| Stock | 11-Aug | 12-Aug | % Change |
| Flame Tree Group Holdings | 1.28 | 1.23 | -3.91% |
| Eaagads Ltd | 15 | 14.5 | -3.33% |
| Shri Krishana Overseas Plc | 6.1 | 5.9 | -3.28% |
| Britam Holdings Plc | 8.28 | 8.02 | -3.14% |
| Kenya Airways Ltd | 4.88 | 4.78 | -2.05% |

Market Turnover 12th Aug 2025

| Sector | Turnover (Kes. Mn) |
|--------------------------|--------------------|
| Banking | 229.94 |
| Telecommunication | 58.84 |
| Manufacturing and Allied | 51.97 |
| Commercial and Services | 9.95 |
| Energy and Petroleum | 9.55 |
| Insurance | 4.26 |
| Investment | 2.49 |
| Construction and Allied | 1.26 |
| Agricultural | 1.13 |
| Exchange Traded Funds | 0.12 |

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