

### Daily Market Wrap

- The stock market experienced a marginal increase in the share prices. The overall prices (NASI) increased by 0.78% with all other NSE tracking indicators gaining.
- The value of equities turnover declined by 21.59% from Kes. 746.09Mn on 14<sup>th</sup> August 2025 to Kes. 585.04 on 15<sup>th</sup> August 2025. Similarly, the volumes traded during the day dipped by 25.16% from 29.77Mn shares in 14<sup>th</sup> August 2025 to 22.28Mn shares in 15<sup>th</sup> August 2025.
- The focus of the stock market remained on Telecommunication, Banking, and Manufacturing sectors transacting Kes. 231.21Mn, Kes. 185.41Mn, and Kes. 115.09Mn of market turnover respectively.
- The day's top movers were Safaricom, EABL, and Equity Group with market turnovers totaling Kes. 231.21Mn, Kes. 113.69Mn, and Kes. 115.09Mn respectively.
- Co-operative Bank Group Plc reported their H1 2025 results on 14<sup>th</sup> August 2025. The lender realized an 8.3% increase in profit before tax (PBT) from Kes. 18.2Bn in H1 2024 to Kes. 19.7Bn in H1 2025. The bank's profit after tax (PAT) rose by 8.4% to Kes. 14.1Bn from Kes. 13.0Bn realized during H1 2024. The strong financial performance for the period H1 2025 has been largely attributed to a significant growth in key areas that include assets, equity, and customer deposits.

Market Indicators			
Indicator	14-Aug	15-Aug	% Change
NSE10 Share Index	1635	1644.52	0.58%
NSE20 Share Index	2664.29	2670.48	0.23%
NSE25 Share Index	4279.56	4299.73	0.47%
NASI	164.38	165.66	0.78%
Mkt Capitalization (Bn)	2589.72	2610	0.78%
Volumes Traded (Mn)	29.77	22.28	-25.16%
Equities Turnover (Mn)	746.09	585.04	-21.59%

Top Gainers			
Stock	14-Aug	15-Aug	% Change
Car & General (K) Ltd	29	31.9	10.00%
Eveready East Africa	1.48	1.62	9.46%
Home Afrika Ltd	0.65	0.69	6.15%
Jubilee Holdings	273.5	286.3	4.66%
Express Kenya Plc	4.13	4.26	3.15%

Top Movers			
Stock	Price	Volume	Value (Mn)
Safaricom Plc	26.90	8595318	231.21
EABL	207.00	549242	113.69
Equity Group	54.50	1561075	85.08
KCB Group	54.00	1254013	67.72
KenGen Co.	7.42	2276661	16.89

Top Losers			
Stock	14-Aug	15-Aug	% Change
Olympia Capital Holdings	6.90	6.56	-0.05
TPS Eastern Africa Ltd	14.45	13.80	-0.04
HF Group Plc	9.58	9.22	-0.04
Kakuzi Plc	385.75	372.00	-0.04
Flame Tree Group Holdings	1.26	1.22	-0.03

### Market Turnover 15th-Aug-2025

Industry	Turnover (Kes. Mn)
Telecommunication	231.21
Banking	185.41
Manufacturing & Allied	115.09
Energy & Petroleum	30.27
Commercial & Services	10.47
Insurance	8.80
Agriculture	1.91
Investment	0.87
Construction & Allied	0.61
Automobiles & Accessories	0.54
Investment services	0.19

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