

Daily Market Wrap

- NASI index reduced by 0.10% on 19th August 2025. The other three indices, NSE10, NSE20, and NSE25 edged up by 0.12%, 0.41%, and 0.01% respectively.
- The value of equities dipped by 31.98% from Kes. 607.32Mn on 18th August 2025 to Kes. 413.08Mn on 19th August 2025. Similarly, the traded equity volumes reduced by 30.2% to 15.29Mn trades.
- Unlike other days, where the telecommunication sector has dominated, the day's market focus turned on Banking, Manufacturing, and Energy and Petroleum sector transacting Kes. 246.38Mn, Kes. 95.44Mn, and Kes. 28.48Mn of market turnover respectively.
- KCB Group, EABL, and Equity Group topped in the top movers list after transacting Kes. 126.70Mn, Kes. 88.45Mn, and Kes. 67.13Mn respectively. Safaricom under the telecommunication sector came a distant fourth transacting Kes. 20.55Mn of market turnover.
- The secondary bond market activities increased by 103.10% with preference on infrastructure bonds where IFB1/2018/15Yr, IFB1/2022/19Yr, and IFB1/2022/19Yr were the most traded with Ke. 1.95Bn, Kes. 1.40Bn, and Kes. 1.08Bn respectively.
- The Nairobi Stock Exchange (NSE) made gains of Kes. 1.00Trn in one year hitting a 3-year high. This is after most investors opted to reallocate their assets from government issued bonds whose returns have been on the fall recently. On the other hand, the value of shares has jumped from Kes. 1.6Trn to Kes. 2.62Trn making a gain of Kes. 518Bn from the beginning of June 2025.

Market Indicators

INDICATOR	19-Aug	% Change
NSE10 Share Index	1651.64	0.12%
NSE20 Share Index	2700.67	0.41%
NSE25 Share Index	4317.27	0.01%
NASI	166.18	-0.10%
Mkt Capitalization (Bn)	2618.14	-0.09%
Volumes Traded (Mn)	15.29	-30.25%
Equities Turnover (Mn)	413.08	-31.98%
Bond Turnover(Bn)	12.78	103.10%

Top Gainers

Stock	Price (Kes)	% Change
TPS Eastern Africa	15.00	9.49%
Crown Paints Kenya	47.90	8.74%
Eaagads Ltd	16.50	7.84%
E.A.Portland Cement Co.	62.75	7.26%
Car & General (K) Ltd	33.00	5.77%

Top Movers

Stock	Price (Kes)	Turnover (Mn)
KCB Group	54.50	126.70
EABL	211.25	88.45
Equity Group	54.75	67.13
Safaricom	26.80	20.55
I&M Group	38.75	13.33

Top Losers

Stock	Price (Kes)	% Change
Eveready East Africa	1.34	-8.84%
Olympia Capital Holdings Ltd	5.98	-4.78%
Express Kenya Plc	4.18	-4.13%
Liberty Kenya Holdings	11.00	-3.93%
Unga Group Ltd	19.25	-3.51%

Market Turnover 19-Aug-2025

Sector	Turnover (Mn)
Banking	246.38
Manufacturing & Allied	95.44
Energy & Petroleum	28.48
Telecommunication	20.55
Insurance	12.79
Commercial & Services	5.52
Agricultural	2.47
Construction & Allied	0.63
Exchange Traded Funds	0.49
Investment Services	0.29
Investment	0.26
Automobiles and Accessories	0.24

Research analyst certification:

The research analyst(s) primarily responsible for the preparation and content of all or any identified portion of this research report hereby certifies that all of the views expressed herein accurately reflect their personal views. Each research analyst(s) also certify that no part of their compensation was, is, or will be, directly or indirectly, related to the view(s) expressed by that research analyst in this research report.

Terms of use-Disclaimer:

This research report has been prepared by Kingdom Securities Limited and is for information purposes only. This research report should not be construed as an offer or solicitation to sell or buy any investment or product. Any opinions expressed herein reflect the analyst's judgment at the date of publication and neither Kingdom Securities Limited nor any of its affiliates or employees accepts any responsibility in respect of the information or recommendations contained herein. Unless otherwise stated, the opinions contained in this material are as of the date indicated and are subject to change at any time without prior notice. Past performance is not a guarantee or indication of future results.

The information and opinions contained in this Material have been derived from sources believed to be reliable and in good faith or constitute Kingdom Securities' judgement as at the date of this research, but no warranty is made as to their accuracy and any opinions are subject to change and may be superseded without notice. In no circumstances will Kingdom Securities or its employees be liable to you for any errors or omissions in this report or for any losses you may incur in following any recommendations in the report. Kingdom Securities is a Subsidiary of Co-operative Bank of Kenya.

Kingdom Securities Ltd – A subsidiary of Co-operative Bank Limited. Co-operative Bank House- 5th floor, P.O Box 48231 - 00100 Nairobi, Kenya

Office: 0711049540

Email: kingdomresearch@co-opbank.co.ke

Research Department

Dennis Langat	dlangat@co-opbank.co.ke	+254 711049592
Chrisanthus Lunani	clunani@co-opbank.co.ke	+254711049973

Sales Team

Alfred Too	atoo@co-opbank.co.ke	+254 711049330
Moffat Asena	amoffat@co-opbank.co.ke	+254 711049663
Gloria Ohito	gohito@co-opbank.co.ke	+254711049993
Maritim Cheruyot	mcheruyot@co-opbank.co.ke	+254711029534

Client Service and Operation

info@kingdomsecurities.co.ke	+254711049540
--	---------------