

### Daily Market Wrap

- All share indices surged up on 20<sup>th</sup> August 2025 with NASI, NSE20, and NSE 25 increasing by 0.94%, 1.02%, and 0.78% respectively.
- The value of equities increased by 114.68% to Kes. 886.81Mn turnover with a 156.57% increase in volumes traded to 39.23Mn equity trades.
- The market focused on Banking, Telecommunication, and Manufacturing sectors transacting Kes. 621.09Mn, Kes. 87.19Mn, and Kes. 85.21Mn of market turnover respectively.
- Flame Tree Group, NSE, and Eaagads Ltd featured in the day's top gainer's list with a price change of 9.16%, 9.13%, and 8.79% respectively.
- The top movers comprised of KCB Group, Equity Group, and Safaricom, pulling a market turnover of Kes. 342.53Mn, Kes. 118.17Mn, and Kes. 87.19Mn.
- Equity Group had the most active foreign buy counter with a turnover of Kes. 72.92Mn. On the other hand, Scan Group topped in the foreign sells transacting Kes. 14.50Mn.
- The secondary bond market activities increased by 101.88% from Kes. 12.78Bn on 19<sup>th</sup> August 2025 to Kes. 25.80Bn on 20<sup>th</sup> August 2025. FXD1/2020/15Yr, IFB1/2022/19Yr, and IFB/2018/15Yr were the most traded with Kes. 2.18Bn, Kes. 1.03Bn, and Kes. 1.00Bn turnover respectively.
- KCB Group Plc initiated talks aimed at expanding its operations in Ethiopia by acquiring 40% in an unnamed Ethiopian Bank. The discussions to enter the Ethiopian market comes after the Ethiopian government allowed foreign banks to operate in the country from June 2025. The decision to expand to Ethiopia is strategic as it positions KCB to benefit from first-mover competitive advantage in a market that had been previously untapped due to state protectionism. Potential investors should consider a BUY on KCB stock for long term as it explores growth avenues through regional expansion.

Market Indicators			
Indicator	Share Price 19-Aug	Share Price 20-Aug	% Change
NSE10 Share Index	1651.64	1669.32	1.07%
NSE20 Share Index	2700.67	2728.26	1.02%
NSE25 Share Index	4317.27	4351.10	0.78%
NASI	166.18	167.75	0.94%
Mkt Capitalization (Bn)	2618.14	2642.84	0.94%
Volumes Traded (Mn)	15.29	39.23	156.57%
Equities Turnover (Mn)	413.08	886.81	114.68%
Bonds Turnover (Bn)	12.78	25.80	101.88%

Top Gainers		
Stock	Share Price	% Change
Flame Tree Group	1.43	9.16%
NSE	13.15	9.13%
Eaagads Ltd	17.95	8.79%
Sanlam Kenya Plc	9.10	8.33%
Africa Mega Agricorp	80.00	8.11%

### Top Movers

Stock	Share Price	Turnover (Kes. Mn)
KCB Group	54.50	342.53
Equity Group	55.75	118.17
Safaricom	27.25	87.19
Stanbic Holdings	182.00	79.54
EABL	215.50	74.15

### Top Losers

Stock	Share Price	% Change
Eveready East Africa Ltd	1.24	-7.46%
E.A.Portland Cement	58.25	-7.17%
Crown Paints Kenya Plc	44.50	-7.10%
Olympia Capital Holdings	5.60	-6.35%
Sameer Africa Plc	13.65	-5.86%

### Top Foreign Buys

Stock	Share Price	Turnover (Kes. Mn)
Equity Group	55.75	72.92
Safaricom	27.25	27.75
Kenya Power	11.35	5.68
CIC	4.38	1.46
Kenya Airways	4.70	0.05

### Top Foreign Sells

Stock	Share Price	Turnover (Kes. Mn)
Scan Group	2.85	14.50
Safaricom	27.25	12.61
Uchumi	0.30	9.62
Kenya Power	11.35	4.22
Kenya Airways	4.70	4.15

### Top Foreign Net Inflows

Stock	Share Price	Net Inflows (Kes. Mn)
Equity Group	55.75	70.61
Safaricom	27.25	15.14
Kenya Power	11.35	1.46
CIC	4.38	1.46
Crown Paints	44.50	0.04

### Top Foreign Net Outflows

Stock	Share Price	Net Outflows (Kes. Mn)
Scan Group	2.85	-14.50
Uchumi	0.30	-9.62
Kenya Airways	4.77	-4.10
KCB Group	54.50	-1.05
Unga Ltd	19.95	-0.79

### Market Turnover 20-Aug-2025

Sector	Turnover (Kes. Mn)
Banking	621.09
Telecommunication	87.19
Manufacturing	85.21
Insurance	29.36
Energy & Petroleum	26.03
Commercial & Services	24.59
Agricultural	9.95
Investment	1.28
Investment & Services	1.22
Automobiles & Accessories	1.09
Exchange Traded Funds	0.82
Construction	0.26

### MARKET SUMMARY

SECTOR	Share Price 19-Aug	Share Price 20-Aug	%Change	% YTD	Mkt Turnover (Kes. Mn)	Net Foreign Flows (Kes. Mn)
<b>AGRICULTURAL</b>						
Eaagads Ltd	16.50	17.95	8.79%	49.58%	0.23	
Kakuzi Plc	400.00	381.00	-4.75%	-2.93%	3.66	
Kapchorua Tea Kenya	321.00	329.00	2.49%	37.51%	0.04	
The Limuru Tea Co. Plc	310.25	310.25	0.00%	-11.36%	0.01	
Sasini Plc	16.00	16.15	0.94%	7.67%	4.90	
Williamson Tea Kenya Plc	240.75	240.25	-0.21%	6.90%	1.11	-0.79
<b>AUTOMOBILES &amp; ACCESSORIES</b>						
Car & General (K) Ltd	33.00	33.05	0.15%	32.20%	1.09	
<b>BANKING</b>						
ABSA Group	19.60	19.60	0.00%	3.98%	16.53	-0.35
BK Group	36.55	38.80	6.16%	10.86%	0.06	
DTB Group	87.00	87.25	0.29%	30.71%	1.38	
Equity Group	54.75	55.75	1.83%	16.15%	118.17	70.61
HF Group	9.32	9.40	0.86%	104.35%	9.11	
I&M Group	38.75	38.45	-0.77%	6.81%	1.49	
KCB Group	54.50	54.50	0.00%	28.54%	342.53	-1.05
NCBA Group	64.50	64.00	-0.78%	25.49%	1.65	-0.01
Stanbic Holdings	183.50	182.00	-0.82%	30.23%	79.54	
StanChart Bank Kenya	341.50	335.00	-1.90%	17.44%	10.84	0.04
Co-op Bank Group	17.25	17.25	0.00%	-1.15%	39.81	
					0.00	
<b>COMMERCIAL AND SERVICES</b>						
Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00	
Eveready East Africa	1.34	1.24	-7.46%	5.98%	0.09	
Express Kenya	4.18	4.36	4.31%	21.11%	0.23	
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00	
Kenya Airways Ltd	4.70	4.70	0.00%	22.72%	4.28	-4.10
Longhorn Publishers	2.82	3.02	7.09%	31.30%	0.04	
Nairobi Business Ventures	1.68	1.75	4.17%	-12.94%	0.04	
Nation Media Group	13.75	13.75	0.00%	-4.51%	0.09	
Sameer Africa	14.50	13.65	-5.86%	459.43%	2.22	
Standard Group	5.98	6.20	3.68%	24.25%	0.02	
TPS Eastern Africa Ltd	15.00	14.90	-0.67%	-5.99%	0.05	
Uchumi Supermarket	0.30	0.30	0.00%	87.50%	0.07	
WPP Scangroup	2.80	2.85	1.79%	13.55%	17.47	-14.50

### 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	47.90	44.50	-7.10%	31.27%	0.05	0.04
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00	
E.A.Portland Cement	62.75	58.25	-7.17%	100.52%	0.21	

### ENERGY & PETROLEUM

KenGen Co.	7.44	7.48	0.54%	99.47%	6.38	-0.25
KPLC Ord 2.50	11.30	11.35	0.44%	119.11%	8.99	1.46
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 (K)	29.25	30.30	3.59%	48.89%	0.49	
Umeme Ltd	9.30	9.30	0.00%	-44.31%	10.18	-9.62

### INSURANCE

Britam Holdings	8.30	8.50	2.41%	46.05%	0.72	
CIC Insurance Group	4.17	4.38	5.04%	104.67%	6.07	1.46
Jubilee Holdings Ltd	281.00	281.00	0.00%	60.80%	0.01	
Kenya Re	2.43	2.50	2.88%	85.19%	21.88	
Liberty Kenya Holdings	11.00	10.50	-4.55%	56.72%	0.43	
Sanlam Kenya	8.40	9.10	8.33%	83.84%	0.26	

### INVESTMENT

Centum Investment	11.75	11.80	0.43%	15.69%	0.41	
Home Afrika Ltd	0.69	0.70	1.45%	89.19%	0.86	
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00	
Olympia Capital Holdings Ltd	5.98	5.60	-6.35%	99.29%	0.01	
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00	

### INVESTMENT SERVICES

Nairobi Securities Exchange	12.05	13.15	9.13%	122.88%	1.22	
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### MANUFACTURING & ALLIED

B.O.C Kenya	93.00	99.25	6.72%	11.83%	0.02	
BAT Kenya	437.50	439.75	0.51%	16.88%	9.99	
Carbacid Investments	22.45	22.15	-1.34%	8.85%	0.66	
EABL	211.25	215.50	2.01%	22.79%	74.15	
Flame Tree Group	1.31	1.43	9.16%	48.96%	0.22	
Africa Mega Agricornp	74.00	80.00	8.11%	14.29%	0.01	
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00	
Unga Group Ltd	19.25	19.95	3.64%	33.00%	0.02	-0.01
Shri Krishana Overseas	6.16	6.20	0.65%	5.08%	0.15	

### TELECOMMUNICATION

Safaricom	26.80	27.25	1.68%	58.43%	87.19	15.14
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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	3895.00	3895.00	0.00%	19.48%	0.39	
Satrix MSCI World Feeder ETF	810.00	811.00	0.12%	6.57%	0.43	-0.43

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