

Daily Market Wrap

- All market share indices increased on 21st August 2025 with NASI, NSE20, and NSE25 gaining by 0.67%, 0.19%, and 0.34% respectively.
- Equities turnover declined by 40.16% from Kes. 886.81Mn on 20th August 2025 to Kes. 530.67Mn on 21st August 2025. The volumes of equity traded also dipped by 39% to 23.93Mn trades from 39.23Mn trades on 20th August 2025.
- The market activities focused more on the Manufacturing, Banking, and Telecommunication sectors transacting Kes. 189.60Mn, Kes. 176.54Mn, and Kes. 105.60Mn respectively.
- EABL, Safaricom, and Equity Group topped in the top movers list after transacting market turnovers of Kes. 154.49Mn, Kes. 105.60Mn, and Kes. 74.57Mn respectively.
- Foreigners' participation- the Telecommunication sector dominated both in foreign sells and foreign buys with a market turnover of Kes. 73.75Mn and Kes. 72.75Mn respectively.
- The secondary bond market activities declined by 67.87% from Kes. 25.80Bn to Kes. 8.29Bn market turnover with preference on fixed coupon bonds where FXD1/2020/15Yr, FXD1/2018/25Yr, and FXD1/2020/15Yr were the most traded with Kes. 820.00Mn, Kes. 800.00Mn, and Kes. 683.00Mn respectively.
- Standard Chattered Bank (K) reported its first half of 2025 financial performance results. The lender reported a 21.30% profit at tax (PAT) fall from Kes. 10.28Bn in H1 2024 to Kes. 8.09Bn in H1 2025. Profit before tax (PBT) dropped by 24.78% from Kes. 14.49Bn in H1 2024 to Kes. 10.90Bn in H1 2025. The company's decline in H1 2025 financial performance was largely attributed to a 28.97% drop in non-interest income from Kes. 9.56Bn in H1 2024 to Kes. 6.79Bn in H1 2025. The group's performance was also hit by a 7.40% decrease in interest income to Kes. 15.30Bn as a result of declining interest rates in the economy. The performance was also affected by a reduction in the transactional volumes, and margins in transaction services, markets, and wealth solutions. However, the bank retained an interim dividend payment of Kes. 8.00 per share payable on 7th October 2025.
- DTB Group (K) reported a 10.49% PAT increase from Kes. 4.86Bn in H1 2024 to Kes. 5.37Bn in its H1 2025 financial performance. PBT rose by 14.51% from Kes. 6.27Bn in H1 2024 to Kes. 7.18Bn in H1 2025. The lender's net interest income rose by 11.77% from Kes. 14.19Bn in H1 2024 to Kes. 15.86Bn in H1 2025. Non-interest income declined by 5.01% from Kes. 6.39Bn in H1 2024 to Kes. 6.07Bn in H1 2025. The bank maximized shareholders' value by increasing earnings per share from Kes. 15.54 per share in H1 2024 to Kes. 17.04 per share in H1 2025.
- On Tuesday, 19th August 2025, the Central Bank of Kenya (CBK) opened a tap sale for the August 2025 infrastructure bond to raise Kes. 50.00Bn as part of the government's efforts to achieve a local borrowing target

of Kes. 635.50Bn and fund the increased debt service cost in August 2025. Although the CBK had initially offered to raise Kes. 50.00Bn from the tap sale, it netted Kes. 179.77Bn from a Kes.207.45Bn bid it attracted from investors. The tap sale was oversubscribed to about four times prompting the CBK to close the sale a day earlier having achieved the target. The August bond stems from a pair of infrastructure bonds (IFB1/2018/015 and IFB1/2022/019) that were first issued in 2018 and 2022. The papers were re-opened between 21st July 2025 and 13th August 2025 to raise Kes. 90.00Bn. The sale attracted bids of Kes. 323.43Bn out of which Kes. 95.01Bn was accepted by the CBK.

Market Indicators

Indicator	20-Aug	21-Aug	% Change
NSE10 Share Index	1669.32	1681.84	0.75%
NSE20 Share Index	2728.26	2733.31	0.19%
NSE25 Share Index	4351.1	4365.68	0.34%
NASI	167.75	168.87	0.67%
Mkt Capitalization (Bn)	2642.84	2660.53	0.67%
Volumes Traded (Mn)	39.23	23.93	-39.00%
Equities Turnover (Mn)	886.81	530.67	-40.16%
Bonds Turnover (Bn)	25.8	8.29	-67.87%

Top Gainers

Stock	Share Price	% Change
NSE	14.40	9.51%
Eaagads Ltd	19.55	8.91%
Express Kenya	4.65	6.65%
E.A.Portland Cement	62.00	6.44%
Flame Tree Group	1.52	6.29%

Top Movers

Stock	Share Price	Market Turnover (Kes. Mn)
EABL	216.25	154.49
Safaricom	27.90	105.60
Equity Group	55.75	74.57
KCB Group	54.00	36.44
ABSA Group	19.90	35.06

Top Losers

Stock	Share Price	% Change
Sanlam Kenya	8.20	-9.89%
B.O.C Kenya	90.75	-8.56%
Olympia Capital Holdings	5.16	-7.86%
StanChart Bank	312.25	-6.79%
Eveready East Africa	1.16	-6.45%

Top Foreign Buys

Stock	Share Price	Mkt Turnover (Kes. Mn)
Safaricom	27.90	73.75
Equity Group	55.75	57.90
EABL	216.25	52.55
DTB Group	88.00	6.46
I & M Bank	38.40	0.46

Top Foreign Sells

Stock	Share Price	Mkt Turnover (Kes. Mn)
Safaricom	27.90	72.75
Equity	55.75	50.21
Kenya Airways	4.69	2.64
Umeme	9.30	2.60
EABL	216.25	1.12

Top foreign Inflows

Stock	Share Price	Net Inflow (Kes. Mn)
EABL	216.25	51.43
Equity Group	55.75	7.70
DTB Group	88.00	6.39
Safaricom	27.90	1.00
I&M Bank	38.40	0.46

Top Foreign Outflows

Stock	Share Price	Net Outflow (Kes. Mn)
Kenya Airways	4.69	-2.64
Umeme	9.3	-2.60
Liberty Kenya	11.05	-0.07
Eaagads	19.55	-0.01

Market Turnover 21-Aug-2025

Sector	Turnover (Kes. Mn)
Manufacturing	189.60
Banking	176.54
Telecommunication	105.60
Insurance	29.79
Energy & Petroleum	15.97
Commercial & Services	8.48
Investment Services	1.46
Agricultural	1.39
Investment	1.31
Construction & Allied	0.35
Automobiles & Accessories	0.07

MARKET SUMMARY

SECTOR	Share Price 20-Aug	Share Price 21-Aug	%Change	% YTD	Market Turnover (Kes. Mn)
AGRICULTURAL					
Eaagads Ltd	17.95	19.55	0.09	0.63	0.12
Kakuzi Plc	381.00	381.00	0.00	-0.03	0.00
Kapchorua Tea Kenya	329.00	327.75	0.00	0.37	0.57
The Limuru Tea Co. Plc	310.25	310.25	0.00	-0.11	0.00
Sasini Plc	16.15	17.00	0.05	0.13	0.35
Williamson Tea Kenya Plc	240.25	243.25	0.01	0.08	0.34
AUTOMOBILES & ACCESSORIES					
Car & General (K) Ltd	33.05	32.35	-0.02	0.29	0.07
BANKING					
ABSA Group	19.60	19.90	0.02	0.06	35.06
BK Group	38.80	38.90	0.00	0.11	0.06
DTB Group	87.25	88.00	0.01	0.32	8.54
Equity Group	55.75	55.75	0.00	0.16	74.57
HF Group	9.40	9.42	0.00	1.05	1.38
I&M Group	38.45	38.40	0.00	0.07	3.12
KCB Group	54.50	54.00	-0.01	0.27	36.44

NCBA Group	64.00	62.00	-0.03	0.22	5.84
Stanbic Holdings	182.00	183.50	0.01	0.31	0.85
StanChart Bank Kenya	335.00	312.25	-0.07	0.09	8.37
Co-op Bank Group	17.25	17.35	0.01	-0.01	2.32

COMMERCIAL AND SERVICES

Deacons (East Africa)	0.45	0.45	0.00	0.00	0.00
Eveready East Africa	1.24	1.16	-0.06	-0.01	0.12
Express Kenya	4.36	4.65	0.07	0.29	0.01
Homeboyz Entertainment	4.66	4.66	0.00	0.00	0.00
Kenya Airways Ltd	4.70	4.69	0.00	0.22	3.40
Longhorn Publishers	3.02	2.95	-0.02	0.28	0.01
Nairobi Business Ventures	1.75	1.71	-0.02	-0.15	0.13
Nation Media Group	13.75	13.75	0.00	-0.05	0.12
Sameer Africa	13.65	12.85	-0.06	4.27	4.00
Standard Group	6.20	6.20	0.00	0.24	0.03
TPS Eastern Africa Ltd	14.90	14.90	0.00	-0.06	0.00
Uchumi Supermarket	0.30	0.30	0.00	0.88	0.05
WPP Scangroup	2.85	2.85	0.00	0.14	0.62

CONSTRUCTION & ALLIED

ARM Cement Plc	5.55	5.55	0.00	0.00	0.00
Bamburi Cement	54.00	54.00	0.00	-0.02	0.00
Crown Paints Kenya	44.50	44.50	0.00	0.31	0.00
E.A.Cables Ltd	1.71	1.71	0.00	0.61	0.00
E.A.Portland Cement	58.25	62.00	0.06	1.13	0.35

ENERGY & PETROLEUM

KenGen Co.	7.48	7.52	0.01	1.01	6.93
KPLC Ord 2.50	11.35	11.25	-0.01	1.17	5.17
KPLC 4% Pref 20.00	4.10	4.10	0.00	0.02	0.00
KPLC 7% Pref 20.00	6.00	6.00	0.00	0.00	0.00
TotalEnergies Marketing Kenya	30.30	30.80	0.02	0.51	1.18
Umeme Ltd	9.30	9.30	0.00	-0.44	2.70

INSURANCE

Britam Holdings	8.50	8.86	0.04	0.52	1.19
CIC Insurance Group	4.38	4.45	0.02	1.08	3.71

Jubilee Holdings Ltd	281.00	276.00	-0.02	0.58	0.04
Kenya Re	2.50	2.50	0.00	0.85	21.31
Liberty Kenya Holdings	10.50	11.05	0.05	0.65	0.57
Sanlam Kenya	9.10	8.20	-0.10	0.66	2.97

INVESTMENT

Centum Investment	11.80	12.10	0.03	0.19	0.28
Home Afrika Ltd	0.70	0.72	0.03	0.95	0.79
Kurwitu Ventures Ltd	1500.00	1500.00	0.00	0.00	0.00
Olympia Capital Holdings	5.60	5.16	-0.08	0.84	0.24
Trans-Century Plc	1.12	1.12	0.00	1.80	0.00

INVESTMENT SERVICES

NSE	13.15	14.40	0.10	1.44	1.46
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MANUFACTURING & ALLIED

B.O.C Kenya	99.25	90.75	-0.09	0.02	0.01
BAT Kenya	439.75	440.25	0.00	0.17	33.85
Carbacid Investments	22.15	22.75	0.03	0.12	0.01
EABL	215.50	216.25	0.00	0.23	154.49
Flame Tree Group	1.43	1.52	0.06	0.58	0.61
Africa Mega Agricorp	80.00	80.00	0.00	0.14	0.01
Mumias Sugar	0.27	0.27	0.00	0.00	0.00
Unga Group Ltd	19.95	20.00	0.00	0.33	0.32
Shri Krishana Overseas	6.20	6.24	0.01	0.06	0.31

TELECOMMUNICATION

Safaricom	27.25	27.90	0.02	0.62	105.60
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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	0.19	0.00
Satrix MSCI World Feeder ETF	811.00	811.00	0.00	0.07	0.00

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