

Daily Market Wrap

- All market share indices increased on 22nd August 2025 with NASI, NSE20, and NSE25 gaining by 0.69%, 0.93%, and 0.37% respectively.
- The market turnover for equities dropped by 4.20% from Kes. 530.67Mn on 21st August 2025 to Kes. 508.38Mn on 22nd August 2025 with a 7.61% increase in volumes traded from 23.93Mn to 25.75Mn trades on 22nd August 2025.
- The market focused more on the Telecommunication, Banking, and Energy & Petroleum sectors with market turnovers worth Kes. 269.66Mn, Kes. 163.98Mn, and Kes. 26.41Mn respectively.
- The day's top movers comprised of Safaricom, Equity Group, and KCB Group after transacting Kes. 269.66Mn, Kes. 86.60Mn, and Kes. 42.11Mn of market turnover respectively.
- Foreigners' participation- the Telecommunication sector continued to dominate in foreign sells and foreign buys with a market turnover of Kes. 226.56 and Kes. 255.75Mn respectively. Equity Group topped in foreigner's net inflows with Kes. 49.47Mn as Umeme Group dominated in foreigner's net outflows with Kes. 1.84Mn.
- The secondary bond market declined by 50.30% in market turnover from Kes. 8.29Bn on 21st August 2025 to Kes. 4.12Bn on 22nd August 2025. The most traded bonds were FXD1/2020/15Yr and FXD1/2018/15Yr with 700Mn and 260Mn market turnover respectively.
- Sanlam Kenya Plc released their first half of 2025 financial results. The insurer reported an 89.03% decrease in profit after tax (PAT) from Kes. 282.21Mn in H1 2024 to Kes. 30.96Mn in H1 2025. Profit before tax (PBT) reduced sharply by 89.90% from Kes. 494.54Mn in H1 2024 to Kes. 49.95Mn in H1 2025. The company's weak performance was driven by a swing to loss related to net finance expenses from insurance contracts which rose by 73.37% from Kes. 1.69Mn in H1 2024 to Kes. 2.93Mn in H1 2025. During this period, the insurer completed a recapitalization and debt payment initiative, reshaping the key elements of the balance sheet. The insurer's share price has since dropped by 5.85%.

Market Indicators			
Indicator	21-Aug	22-Aug	% Change
NSE10 Share Index	1681.84	1685.33	0.21%
NSE20 Share Index	2733.31	2758.62	0.93%
NSE25 Share Index	4365.68	4381.7	0.37%
NASI	168.87	170.03	0.69%
Mkt Capitalization (Bn)	2660.53	2678.74	0.68%
Volumes Traded (Mn)	23.93	25.75	7.61%
Equities Turnover (Mn)	530.67	508.38	-4.20%
Bonds Turnover (Bn)	8.29	4.12	-50.30%

Top Gainers		Share Price	Share Price	
Stock		21-Aug	22-Aug	% Change
Standard Group		6.20	6.82	10.00%
Satrix MSCI Feeder		811.00	892.00	9.99%
NSE		14.40	15.75	9.38%
Eaagads Ltd		19.55	21.10	7.93%
Crown Paints Kenya		44.50	47.90	7.64%

Top Movers

Stock	Share Price	Market Turnover (Kes. Mn)
Safaricom	28.25	269.66
Equity Group	55.00	86.60
KCB Group	54.00	42.11
KPLC Ord 2.50	11.40	15.01
Kenya Re	2.66	14.77

Top Losers

Stock	Share Price 21-Aug	Share Price 22-Aug	% Change
Sanlam Kenya	8.20	7.72	-5.85%
Nation Media Group	13.75	13.00	-5.45%
Longhorn Publishers	2.95	2.80	-5.08%
Nairobi Business Ventures	1.71	1.66	-2.92%
E.A.Portland Cement	62.00	60.25	-2.82%

Top Foreign Buys

Stock	Share Price	Turnover (Kes. Mn)
Safaricom	28.25	255.75
Equity Group	55.00	86.10
DTB Group	87.75	1.76
Stanbic Group	183.75	0.62

Top Foreign Sells

Stock	Share Price	Turnover (Kes. Mn)
Safaricom	28.25	226.56
Equity Group	55.00	36.63
Umeme	9.38	1.84
Kenya Airways	4.69	1.70
Kapchorua Tea	320.25	1.54

Top Foreign Inflows

Stock	Share Price	Net Inflow (Kes. Mn)
Equity Group	55.00	49.47
Safaricom	28.25	29.18
DTB Group	87.75	1.71
Stanbic Group	183.75	0.62

Market Turnover

Sector	Turnover (Kes. Mn)
Telecommunication	269.66
Banking	163.98
Energy & Petroleum	26.41
Insurance	22.67
Manufacturing	12.51
Commercial & Services	6.04
Agriculture	2.60
Investment Services	2.34
Investment	2.06
Exchange Traded Funds	0.74
Construction & Allied	0.14
Automobiles & Accessories	0.02

Top Foreign Outflows

Stock	Share Price	Net Outflows (Kes. Mn)
Umeme	9.38	-1.84
Kenya Airways	4.69	-1.70
Kapchorua Tea	320.25	-1.54
BAT	441	-0.88
Standard Chartered	315.25	-0.84

MARKET SUMMARY

SECTOR	Share Price 21-Aug	Share Price 22-Aug	%Change	YTD %Change	Market Turnover (Kes. Mn)
AGRICULTURAL					
Eaagads Ltd	19.55	21.10	7.93%	75.83%	0.02
Kakuzi Plc	381.00	381.00	0.00%	-2.93%	0.00
Kapchorua Tea Kenya	327.75	320.25	-2.29%	33.86%	1.58
The Limuru Tea Co. Plc	310.25	310.25	0.00%	-11.36%	0.00
Sasini Plc	17.00	18.00	5.88%	20.00%	0.14
Williamson Tea Kenya Plc	243.25	240.00	-1.34%	6.79%	0.86

AUTOMOBILES & ACCESSORIES

Car & General (K) Ltd	32.35	32.00	-1.08%	28.00%	0.02
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BANKING

ABSA Group	19.90	19.95	0.25%	5.84%	1.56
BK Group	38.90	39.30	1.03%	12.29%	0.36
DTB Group	88.00	87.75	-0.28%	31.46%	2.69
Equity Group	55.75	55.00	-1.35%	14.58%	86.60
HF Group	9.42	9.36	-0.64%	103.48%	9.28
I&M Group	38.40	38.20	-0.52%	6.11%	1.75
KCB Group	54.00	54.00	0.00%	27.36%	42.11
NCBA Group	62.00	62.25	0.40%	22.06%	4.19
Stanbic Holdings	183.50	183.75	0.14%	31.48%	0.92
StanChart Bank Kenya	312.25	315.25	0.96%	10.52%	4.00
Co-op Bank Group	17.35	17.35	0.00%	-0.57%	10.52

COMMERCIAL AND SERVICES

Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.16	1.13	-2.59%	-3.42%	0.18
Express Kenya	4.65	4.75	2.15%	31.94%	0.00
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	4.69	4.69	0.00%	22.45%	2.08
Longhorn Publishers	2.95	2.80	-5.08%	21.74%	0.01
Nairobi Business Ventures	1.71	1.66	-2.92%	-17.41%	0.30
Nation Media Group	13.75	13.00	-5.45%	-9.72%	0.04
Sameer Africa	12.85	12.90	0.39%	428.69%	1.14
Standard Group	6.20	6.82	10.00%	36.67%	0.09

TPS Eastern Africa Ltd	14.90	15.50	4.03%	-2.21%	1.64
Uchumi Supermarket	0.30	0.30	0.00%	87.50%	0.04
WPP Scangroup	2.85	2.85	0.00%	13.55%	0.51

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	44.50	47.90	7.64%	41.30%	0.01
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00
E.A.Portland Cement	62.00	60.25	-2.82%	107.40%	0.14

ENERGY & PETROLEUM

KenGen Co.	7.52	7.56	0.53%	101.60%	8.23
KPLC Ord 2.50	11.25	11.40	1.33%	120.08%	15.01
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 Kenya	30.80	31.35	1.79%	54.05%	0.48
Umeme Ltd	9.30	9.38	0.86%	-43.83%	2.69

INSURANCE

Britam Holdings	8.86	8.78	-0.90%	50.86%	1.17
CIC Insurance Group	4.45	4.68	5.17%	118.69%	4.36
Jubilee Holdings Ltd	276.00	288.75	4.62%	65.24%	1.84
Kenya Re	2.50	2.66	6.40%	97.04%	14.77
Liberty Kenya Holdings	11.05	11.05	0.00%	64.93%	0.11
Sanlam Kenya	8.20	7.72	-5.85%	55.96%	0.41

INVESTMENT

Centum Investment	12.10	12.60	4.13%	23.53%	1.31
Home Afrika Ltd	0.72	0.77	6.94%	108.11%	0.08
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.16	5.04	-2.33%	79.36%	0.67
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

INVESTMENT SERVICES

Nairobi Securities Exchange	14.40	15.75	9.38%	166.95%	2.34
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MANUFACTURING & ALLIED

B.O.C Kenya	90.75	90.75	0.00%	2.25%	0.02
BAT Kenya	440.25	441.00	0.17%	17.21%	7.47
Carbacid Investments	22.75	22.35	-1.76%	9.83%	0.29

EABL	216.25	218.00	0.81%	24.22%	1.07
Flame Tree Group	1.52	1.53	0.66%	59.38%	0.33
Africa Mega Agricorp	80.00	80.00	0.00%	14.29%	0.02
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	20.00	20.50	2.50%	36.67%	0.07
Shri Krishana Overseas	6.24	6.20	-0.64%	5.08%	3.26

TELECOMMUNICATION

Safaricom	27.90	28.25	1.25%	64.24%	269.66
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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%	0.00
Satrix MSCI World Feeder ETF	811.00	892.00	9.99%	17.21%	0.74

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