

Daily Market Wrap

- All market share indices were on the green on 26th August 2025 with NASI, NSE20, and NSE25 gaining by 1.14%, 1.87%, and 0.84% respectively.
- The market turnover for equities increased by 47.52% from Kes. 387.75Mn on 25th August 2025 to Kes. 572.02Mn on 26th August 2025 with a 27.59% increase in volumes traded from 23.56Mn trades on 25th August 2025 to 30.06Mn trades on 26th August 2025. The overall market capitalization grew by 1.14% from Kes. 2684.81Bn on 25th August 2025 to Kes. 2715.30Bn on 26th August 2025.
- The stock market focused more on the Telecommunication sector transacting a market turnover of Kes. 284.15Mn during the day. Other sectors that were most active are banking and manufacturing with market turnovers of Kes. 158.19Mn and Kes. 47.86Mn respectively.
- The most active counters of the day were Safaricom, KCB Group, and Equity Group with market turnovers of Kes. 284.15Mn, Kes. 41.67Mn, and Kes. 39.78Mn respectively. Express Kenya, Sameer Africa, and BOC Kenya were the biggest gainers with share price increase of 10.00%, 9.35%, and 9.24% respectively.
- Foreigners' participation- the Telecommunication sector through Safaricom retained the top spots in the foreign buys and sells with a market turnover of Kes. 257.52Mn and Kes. 217.87Mn respectively. Similarly, the foreign net inflows were topped by the telecommunication sector with a net inflow of Kes. 39.65Mn closely followed by the banking sector (Equity Group) with a net inflow of Kes. 38.96Mn.
- The secondary bond market surged by 488.19% of market turnover from Kes. 3.64Bn on 25th August 2025 to 21.41Bn. The most traded bonds were IFB/2022/19Yr, IFB1/2018/15Yr, and FXD1/2024/3Yr with Kes. 5.31Bn, Kes. 5.28Bn and Kes. 1.25Bn of market turnover respectively.
- Housing Finance Group Ltd released H1 2025 financial performance results reporting a 134.48% profit after tax (PAT) jump from Kes. 266.27Mn in H1 2024 to Kes. 624.34Mn in H1 2025. The lender's total operating income grew by 40.98% from Kes. 2.05Bn in H1 2024 to Kes. 2.89Bn in H1 2025 largely contributed by a 53.38% increase in net interest income from Kes. 1.33Bn in H1 2024 to Kes. 2.04Bn in H1 2025. The Group's balance sheet showed a 20.64% growth in total assets from Kes. 63.75Bn in H1 2024 to Kes. 76.91Bn in H1 2025. Earnings per share dropped from Kes. 1.38 per share in H1 2024 to Kes. 0.66 per share in H1 2025. It is also worth noting that the group's interest expense, a key determinant in the group's profitability, declined by 7.02% from Kes. 1.71Bn in H1 2024 to Kes. 1.59Bn in H1 2025.

Market Indicators

Indicator	25-Aug	26-Aug	% Change
NSE10 Share Index	1689.51	1702.39	0.76%
NSE20 Share Index	2792.72	2845.04	1.87%
NSE25 Share Index	4395.53	4432.38	0.84%
NASI	170.41	172.35	1.14%
Mkt Capitalization (Bn)	2684.81	2715.3	1.14%
Volumes Traded (Mn)	23.56	30.06	27.59%
Equities Turnover (Mn)	387.75	572.02	47.52%
Bonds Turnover (Bn)	3.64	21.41	488.19%

Top Gainers

Stock	Share Price 25-Aug	Share Price 26-Aug	% Change
Express Kenya	5.00	5.50	10.00%
Sameer Africa	13.90	15.20	9.35%
B.O.C Kenya	100.50	109.75	9.20%
Kenya Re	2.74	2.99	9.12%
Flame Tree Group	1.68	1.82	8.33%

Top Movers

Stock	Share Price 25-Aug	Share Price 26-Aug	Mkt Turnover (Kes. Mn)
Safaricom	28.10	28.50	284.15
KCB Group	54.00	54.00	41.67
Equity Group	55.50	56.00	39.78
BAT Kenya	440.00	442.00	35.60

Top Losers

Stock	Share Price 25-Aug	Share Price 26-Aug	% Change
Satrix MSCI World F. ETF	898.00	845.00	-5.90%
NSE	15.60	14.70	-5.77%
TotalEnergies	33.15	31.75	-4.22%
Longhorn Publishers	2.80	2.73	-2.50%
Crown Paints	47.90	46.75	-2.40%

Top Foreign Buys

Stock	Share Price	Turnover (Kes. Mn)
Safaricom	28.48	257.52
Equity Group	55.92	38.96
Sameer Africa	15.19	1.24
DTB Group	87.95	0.88
NCBA Group	63.40	0.64

Top Foreign Sells

Stock	Share Price	Turnover (Kes. Mn)
Safaricom	28.48	217.87
Stanbic	183.68	23.66
KCB Group	53.95	18.28
KPLC	12.39	6.75
KenGen	7.82	3.91

Top Foreign Net Inflows

Stock	Share Price	Net Inflow (Kes. Mn)
Safaricom	28.48	39.65
Equity Group	55.92	38.96
Sameer Africa	15.19	1.24
DTB Group	87.95	0.88
NCBA Group	63.40	0.64

Top Foreign Net Outflows

Stock	Share Price	Net Outflows (Kes. Mn)
Stanbic	183.68	-23.66
KCB Group	53.95	-17.71
KPLC	12.39	-6.75
KenGen	7.82	-3.91
Umeme	10.06	-2.90

Market Turnover

Sector	Turnover (Kes. Mn)
Telecommunication	284.15
Banking	158.19
Manufacturing & Allied	47.86
Energy & Petroleum	40.80
Insurance	29.22
Commercial & Services	6.01
Investment	2.69
Agricultural	1.70
Exchange Traded Funds	1.35
Investment Services	0.94
Construction & Allied	0.70
Automobiles & Accessories	0.08

MARKET SUMMARY

SECTOR	Share Price 225-Aug	Share Price 26-Aug	% Change	YTD % Change	Market Turnover (Kes. Mn)
AGRICULTURAL					
Eaagads Ltd	22.75	22.80	0.22%	90.00%	0.05
Kakuzi Plc	387.00	387.00	0.00%	-1.40%	0.00
Kapchorua Tea Kenya	324.00	329.00	1.54%	37.51%	0.24
The Limuru Tea Co. Plc	310.25	310.25	0.00%	-11.36%	0.00
Sasini Plc	18.30	18.15	-0.82%	21.00%	0.35
Williamson Tea Kenya Plc	240.25	242.50	0.94%	7.90%	1.05
AUTOMOBILES & ACCESSORIES					
Car & General (K) Ltd	32.05	31.40	-2.03%	25.60%	0.08
BANKING					
ABSA Group	19.85	19.90	0.25%	5.57%	6.51
BK Group	41.70	41.45	-0.60%	18.43%	0.12
DTB Group	88.00	88.00	0.00%	31.84%	2.59
Equity Group	55.50	56.00	0.90%	16.67%	39.78
HF Group	9.50	9.48	-0.21%	106.09%	7.17
I&M Group	38.35	38.70	0.91%	7.50%	0.78
KCB Group	54.00	54.00	0.00%	27.36%	41.67
NCBA Group	62.50	63.50	1.60%	24.51%	4.58
Stanbic Holdings	182.75	183.75	0.55%	31.48%	25.25
StanChart Bank Kenya	317.25	320.00	0.87%	12.18%	18.12
Co-op Bank Group	17.45	17.55	0.57%	0.57%	11.61
COMMERCIAL AND SERVICES					
Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.18	1.27	7.63%	8.55%	0.03
Express Kenya	5.00	5.50	10.00%	52.78%	0.03
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	4.76	4.99	4.83%	30.29%	2.78
Longhorn Publishers	2.80	2.73	-2.50%	18.70%	0.04
Nairobi Business Ventures	1.67	1.67	0.00%	-16.92%	0.55
Nation Media Group	13.45	13.85	2.97%	-3.82%	0.10

Sameer Africa	13.90	15.20	9.35%	522.95%	2.32
Standard Group	6.80	6.78	-0.29%	35.87%	0.01
TPS Eastern Africa Ltd	15.15	15.15	0.00%	-4.42%	0.03
Uchumi Supermarket	0.29	0.29	0.00%	81.25%	0.04
WPP Scangroup	2.93	2.92	-0.34%	16.33%	0.09

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	46.75	-2.40%	37.91%	0.11
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00
E.A.Portland Cement	61.75	60.75	-1.62%	109.12%	0.59

ENERGY & PETROLEUM

KenGen Co.	7.60	7.82	2.89%	108.53%	11.88
KPLC Ord 2.50	11.75	12.40	5.53%	139.38%	25.75
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	33.15	31.75	-4.22%	56.02%	0.11
Umeme Ltd	9.70	10.05	3.61%	-39.82%	3.07

INSURANCE

Britam Holdings	8.76	9.00	2.74%	54.64%	0.86
CIC Insurance Group	5.00	5.34	6.80%	149.53%	7.12
Jubilee Holdings Ltd	294.25	294.25	0.00%	68.38%	0.01
Kenya Re	2.74	2.99	9.12%	121.48%	19.21
Liberty Kenya Holdings	11.10	11.05	-0.45%	64.93%	0.48
Sanlam Kenya	7.66	8.14	6.27%	64.44%	1.53

INVESTMENT

Centum Investment	12.85	13.40	4.28%	31.37%	0.58
Home Afrika Ltd	0.78	0.81	3.85%	118.92%	2.09
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.52	5.54	0.36%	97.15%	0.02
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

INVESTMENT SERVICES

Nairobi Securities Exchange	15.60	14.70	-5.77%	149.15%	0.94
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MANUFACTURING & ALLIED

B.O.C Kenya	100.50	109.75	9.20%	23.66%	0.32
BAT Kenya	440.00	442.00	0.45%	17.48%	35.60
Carbacid Investments	22.80	22.75	-0.22%	11.79%	1.11
EABL	220.00	220.00	0.00%	25.36%	10.07
Flame Tree Group	1.68	1.82	8.33%	89.58%	0.66
Africa Mega Agricorp	80.00	80.00	0.00%	14.29%	0.00
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	20.50	20.35	-0.73%	35.67%	0.02
Shri Krishana Overseas	6.20	6.20	0.00%	5.08%	0.08

TELECOMMUNICATION

Safaricom	28.10	28.50	1.42%	65.70%	284.15
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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 F. ETF	898.00	845.00	-5.90%	11.04%	1.35

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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
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