

### Daily Market Wrap

- All market share indices closed in the red on 27th August 2025, reversing the previous day's gains. The NASI index dropped by 0.45% to 171.57 points, reflecting widespread weakness across the equities market. The NSE20 shed 0.28% to close at 2,837.16 points, while the NSE25 declined by 0.37% to settle at 4,415.86 points. Market capitalization decreased by 0.45% to KES 2,703.06Bn from KES 2,715.30Bn recorded on 26<sup>th</sup> August 2025. Equities turnover also declined sharply by 42.73%, falling to KES 327.60Mn from KES 572.02Mn, on the back of a 10.18% contraction in traded volumes to 27.00Mn shares.
- Equity trading activity was subdued on 27th August, with mixed performance across counters. Safaricom remained the most actively traded stock, posting a market turnover of KES 74.66Mn, followed by KCB Group with KES 44.31Mn, while KenGen and Kenya Re recorded turnovers of KES 31.75Mn and KES 30.25Mn respectively.
- On the price performance front, B.O.C Kenya led the gainers, rallying 8.88% to close at KES 119.50. Other top gainers included Home Afrika (+8.64%) and TotalEnergies Kenya (+6.61%). The biggest losers were Kenya Airways, which plunged 19.84% to close at KES 4.00, followed by CIC Insurance Group (-9.36%), Olympia Capital (-6.86%), and Car & General (-6.85%).
- Foreigners' Participation- Foreign investors were net buyers on 27th August 2025, with the bulk of inflows driven by Safaricom (KES 53.01Mn) and Equity Group (KES 18.97Mn).
- On the sell side, the largest outflows were seen in KCB Group (KES -11.41Mn), Kenya Re (KES -6.00Mn), and Kenya Airways (KES -3.15Mn)
- The secondary bond market turnover stood at Kshs. 21.75Bn, slightly up from Kshs. 21.41Bn in the previous session. Activity was concentrated on a few key papers, with the IFB1/2022/19Yr and IFB1/2018/15Yr leading the day at Kshs. 3.56Bn and Kshs. 3.55Bn respectively.
- CIC Insurance Group posted a 10.07% decline in profit after tax to Kes. 638.46Mn for H1 2025, down from Kes. 709.90Mn in H1 2024, translating to earnings per share of Kes. 0.23 against Kes. 0.30 in H1 2024. Insurance revenue grew 8.38% to Kes. 13.87Bn from Kes. 12.80Bn a year earlier, supported by a stronger premium uptake, , highlighting a stronger performance in the insurance market, while net investment results surged 121.46% to Kes. 1.18Bn. However, overall profitability was dragged down by higher insurance service expenses. On the balance sheet, total assets rose 13.24% to Kes. 70.13Bn from Kes. 61.94Bn in H1 2024, supported by an increase in financial investment assets, while total equity improved 10.30% to Kes. 12.15Bn, reflecting a stronger capital base despite the softer bottom-line performance.

### Market Indicators

Indicators	26-Aug	27-Aug	% Change
NSE10 Share Index	1702.39	1696.65	-0.34%
NSE20 Share Index	2845.04	2837.16	-0.28%
NSE25 Share Index	4432.38	4415.86	-0.37%
NASI	172.35	171.57	-0.45%
Mkt Capitalization (Bn)	2715.3	2703.06	-0.45%
Volumes Traded (Mn)	30.06	27	-10.18%
Equities Turnover (Mn)	572.02	327.6	-42.73%
Bond Turnover (Bn)	21.41	21.75	1.59%

### Top Gainers

Stock	Share Price 26-Aug	Share Price 27-Aug	% Change
B.O.C Kenya	109.75	119.50	8.88%
Home Afrika Ltd	0.81	0.88	8.64%
TotalEnergies	31.75	33.85	6.61%
Eveready East Africa	1.27	1.35	6.30%
Sameer Africa	15.20	15.75	3.62%

### Top Movers

Stock	Share Price 26-Aug	Share Price 27-Aug	Mkt Turnover (Kes. Mn)
Safaricom	28.50	28.45	74.66
KCB Group	54.00	53.75	44.31
KenGen Co.	7.82	8.00	31.75
Kenya Re	2.99	2.94	30.25
StanChart Bank	320.00	319.50	27.13

### Top Losers

Stock	Share Price 26-Aug	Share Price 27-Aug	% Change
Kenya Airways Ltd	4.99	4.00	-19.84%
CIC Insurance Group	5.34	4.84	-9.36%
Olympia Capital	5.54	5.16	-6.86%
Car & General (K) Ltd	31.40	29.25	-6.85%
Jubilee Holdings Ltd	294.25	274.75	-6.63%

### Top Foreign Buys

Stock	Share Price (KES)	Turnover (KES Mn)
Safaricom	28.46	60.61
Equity Group	56.00	19.3
DTB Group	88.99	4.06
CIC Insurance	4.84	0.95
Sameer Africa	15.74	0.43

### Top Foreign Sells

Stock	Share Price (KES)	Turnover (KES Mn)
KCB Group	53.68	11.42
Safaricom	28.46	7.6
Kenya Re	2.94	6.00
Kenya Airways	4.00	3.15
Umeme Ltd	9.93	2.82

### Top Foreign Net Inflows

Stock	Share Price (KES)	Net Inflow (KES Mn)
Safaricom	28.46	53.01
Equity Group	56.00	18.97
DTB Group	88.99	4.06
CIC Insurance	4.84	0.60
Sameer Africa	15.74	0.43

### Top Foreign Net Outflows

Stock	Share Price (KES)	Net Outflow (KES Mn)
KCB Group	53.68	-11.41
Kenya Re	2.94	-6.00
Kenya Airways	4.00	-3.15
Umeme Ltd	9.93	-2.81
Satrix MSCI World F. ETF	821.29	-0.45

### MARKET SUMMARY

SECTOR	Share Price 26-Aug	Share Price 27-Aug	Daily % Change	Year to date % Change	Market Turnover (Kes. Millions)
<b>AGRICULTURAL</b>					
Eaagads Ltd	22.80	22.55	-1.10%	87.92%	0.01
Kakuzi Plc	387.00	387	0.00%	-1.40%	0.00
Kapchorua Tea Kenya	329.00	323.25	-1.75%	35.11%	0.22
The Limuru Tea Co. Plc	310.25	310.25	0.00%	-11.36%	0.00
Sasini Plc	18.15	17.85	-1.65%	19.00%	0.40
Williamson Tea Kenya Plc	242.50	250	3.09%	11.23%	3.24

### AUTOMOBILES & ACCESSORIES

Car & General (K) Ltd	31.40	29.25	-6.85%	17.00%	0.33
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### BANKING

ABSA Group	19.90	20	0.50%	6.10%	15.14
BK Group	41.45	41.3	-0.36%	18.00%	0.02
DTB Group	88.00	89	1.14%	33.33%	4.35
Equity Group	56.00	56	0.00%	16.67%	19.95
HF Group	9.48	9.66	1.90%	110.00%	12.74
I&M Group	38.70	38.55	-0.39%	7.08%	8.33
KCB Group	54.00	53.75	-0.46%	26.77%	44.31
NCBA Group	63.50	63.75	0.39%	25.00%	4.37
Stanbic Holdings	183.75	183.25	-0.27%	31.13%	2.63
StanChart Bank Kenya	320.00	319.5	-0.16%	12.01%	27.13
Co-op Bank Group	17.55	17.55	0.00%	0.57%	4.49

### COMMERCIAL AND SERVICES

Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.27	1.35	6.30%	15.38%	0.03
Express Kenya	5.50	5.58	1.45%	55.00%	0.04
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	4.99	4	-19.84%	4.44%	5.16
Longhorn Publishers	2.73	2.8	2.56%	21.74%	0.08
Nairobi Business Ventures	1.67	1.66	-0.60%	-17.41%	0.29
Nation Media Group	13.85	13.2	-4.69%	-8.33%	0.07
Sameer Africa	15.20	15.75	3.62%	545.49%	4.43
Standard Group	6.78	6.6	-2.65%	32.26%	0.00

TPS Eastern Africa Ltd	15.15	15.15	0.00%	-4.42%	0.12
Uchumi Supermarket	0.29	0.3	3.45%	87.50%	0.02
WPP Scangroup	2.92	2.84	-2.74%	13.15%	0.09

### CONSTRUCTION & ALLIED

ARM Cement Plc	5.55	5.55	0.00%	0.00%	0.00
Bamburi Cement	54.00	54	0.00%	-1.82%	0.00
Crown Paints Kenya	46.75	48.35	3.42%	42.63%	0.11
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00
E.A.Portland Cement	60.75	61.75	1.65%	112.56%	0.01

### ENERGY & PETROLEUM

KenGen Co.	7.82	8	2.30%	113.33%	31.75
KPLC Ord 2.50	12.40	12.65	2.02%	144.21%	5.74
KPLC 4% Pref 20.00	4.10	4.1	0.00%	2.50%	0.00
KPLC 7% Pref 20.00	6.00	6	0.00%	0.00%	0.00
TotalEnergies Marketing Kenya	31.75	33.85	6.61%	66.34%	0.34
Umeme Ltd	10.05	9.94	-1.09%	-40.48%	3.01

### INSURANCE

Britam Holdings	9.00	8.96	-0.44%	53.95%	3.40
CIC Insurance Group	5.34	4.84	-9.36%	126.17%	10.06
Jubilee Holdings Ltd	294.25	274.75	-6.63%	57.22%	0.53
Kenya Re	2.99	2.94	-1.67%	117.78%	30.25
Liberty Kenya Holdings	11.05	10.95	-0.90%	63.43%	0.28
Sanlam Kenya	8.14	8.18	0.49%	65.25%	0.03

### INVESTMENT

Centum Investment	13.40	13.75	2.61%	34.80%	0.59
Home Afrika Ltd	0.81	0.88	8.64%	137.84%	0.40
Kurwitu Ventures Ltd	1500.00	1500	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.54	5.16	-6.86%	83.63%	0.22
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

### INVESTMENT SERVICES

Nairobi Securities Exchange	14.70	14.15	-3.74%	139.83%	0.69
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### MANUFACTURING & ALLIED

B.O.C Kenya	109.75	119.5	8.88%	34.65%	0.13
BAT Kenya	442.00	440	-0.45%	16.94%	3.54
Carbacid Investments	22.75	23.1	1.54%	13.51%	1.80
EABL	220.00	215.5	-2.05%	22.79%	0.60
Flame Tree Group	1.82	1.84	1.10%	91.67%	0.08
Africa Mega Agricorp	80.00	80	0.00%	14.29%	0.00
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	20.35	20.45	0.49%	36.33%	0.03
Shri Krishana Overseas	6.20	6.2	0.00%	5.08%	1.42

### TELECOMMUNICATION

Safaricom	28.50	28.45	-0.18%	65.41%	74.66
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### REAL ESTATE INV. TRUST

LAPTRUST IMARA I-REIT	20.00	20	0.00%	0.00%	0.00
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### EXCHANGE TRADED FUNDS

ABSA New Gold ETF	3895.00	3985	2.31%	22.24%	0.24
Satrix MSCI World Feeder ETF	845.00	821	-2.84%	7.88%	0.51

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