

Daily Market Wrap

- All Equities posted modest gains across all key indices. NASI advanced 0.32%, pushing market capitalization higher to Kes. 2,719.26Bn, while NSE 20, and NSE 25 rose by 0.22%, and 0.24% respectively. Market activity surged, with volumes traded climbing 85.29% to 56.29Mn shares and equities turnover nearly tripling by 177.98% to Kes. 1.29Bn, reflecting increased investor participation, particularly in select blue-chip counters.
- The day's top gainers were Express Kenya (+9.97%), Carbacid Investments (+9.76%), and KenGen (+5.80%), while the biggest losers included Flame Tree Group (-9.30%), Eaagads Ltd (-8.55%), and Centum (-5.45%). Safaricom dominated trading with Kes. 801.35Mn in turnover, followed by StanChart at Kes. 107.71Mn and KCB Group at Kes. 72.00Mn.
- Foreigners' Participation- Foreign investors remained active in today's session, with strong demand recorded in Safaricom (Kes. 523.05Mn), Equity Group (Kes. 52.68Mn), and KCB Group (Kes. 27.25Mn). On the sell side, notable exits were seen in Safaricom (Kes. 322.04Mn), KenGen (Kes. 19.74Mn), and Unga Group (Kes. 6.79Mn). Net inflows were dominated by Safaricom (Kes. 201.02Mn), Equity Group (Kes. 52.62Mn), and KCB Group (Kes. 27.19Mn). Overall, the market registered strong foreign demand in blue-chip counters, led by Safaricom, Equity, and KCB, which helped support turnover levels.
- Bond turnover fell to Kes. 9.32Bn from Kes. 15.05Bn in the prior session, across 189 deals. Activity was concentrated in infrastructure bonds, led by IFB1/2018/15Yr (Kes. 2.60Bn), IFB1/2019/16Yr (Kes. 2.50Bn), and IFB1/2019/21Yr (Kes. 2.00Bn). Investors continue to favor long-dated tax-free papers for higher yields.
- NCBA Group posted a profit after tax of Kes. 11.1Bn in H1 2025, a 12.6% increase from Kes. 9.8Bn in H1 2024, driven by income growth and strong subsidiary contributions. The Kenyan unit accounted for 81% of earnings, while regional and non-banking businesses delivered Kes. 1.8Bn and Kes. 804Mn respectively. With a solid capital adequacy ratio of 22.4% and continued digital and branch expansion, the Group declared an interim dividend of Kes. 2.50 per share, reflecting confidence in sustained growth.
- KenyaRe posted a 50.00% rise in profit after tax to Kes. 1.58Bn in H1 2025 from Kes. 1.06Bn, driven by stronger investment income, reduced forex losses, and lower costs despite weaker insurance revenue. Profit before tax rose 48.00% to Kes. 2.24Bn, while total assets grew to Kes. 68.90Bn and shareholders' funds increased to Kes. 51.90Bn.

Market Indicators

Indicator	28-Aug	29-Aug	% Change
NSE10 Share Index	1705	1709.51	0.26%
NSE20 Share Index	2839.52	2845.64	0.22%
NSE25 Share Index	4432.56	4443.4	0.24%
NASI	172.05	172.6	0.32%
Mkt Capitalization (Bn)	2710.56	2719.26	0.32%
Volumes Traded (Mn)	30.38	56.29	85.29%
Equities Turnover (Mn)	463.47	1288.34	177.98%
Bonds Turnover (Bn)	15.05	9.32	-38.07%

Top Movers

Stock	Share Price 28-Aug	Share Price 29-Aug	Mkt Turnover (Kes. Mn)
Safaricom	28.55	28.60	801.35
StanChart Bank K	318.00	320.00	107.71
KCB Group	54.00	54.25	72.00
Equity Group	56.00	56.00	55.39
Stanbic Holdings	184.00	182.50	50.23

Top Gainers

Stock	Share Price 28-Aug	Share Price 29-Aug	% Change
Express Kenya	6.02	6.62	9.97%
Carbacid Investments	24.60	27.00	9.76%
KenGen Co.	8.28	8.76	5.80%
TPS Eastern Africa Ltd	13.95	14.70	5.38%
Liberty Kenya Holdings	10.40	10.90	4.81%

Top Losers

Stock	Share Price 28-Aug	Share Price 29-Aug	% Change
Flame Tree Grp	1.72	1.56	-9.30%
Eaagads Ltd	23.40	21.40	-8.55%
Centum Inv.	13.75	13.00	-5.45%
Sanlam Kenya	8.52	8.20	-3.76%
Sasini Plc	17.70	17.05	-3.67%

Top Foreign Sells

Stock	Share Price	Mkt Turnover (Kes. Mn)
Safaricom	28.60	322.04
KenGen	8.77	19.74
Unga Group Ltd	9.51	6.79
Kenya Re	2.99	6.58
KPLC	12.79	2.89

Top Foreign Buys

Stock	Share Price	Mkt Turnover (Kes. Mn)
Safaricom	28.60	523.05
Equity Group	55.95	52.68
KCB Group	54.25	27.25
DTB Group	89.77	3.22
KenGen	8.77	0.86

Top Foreign Net Outflows

Stock	Share Price	Net Outflows (Kes. Mn)
KenGen	8.77	-18.88
Unga Group Ltd	9.51	-6.79
Kenya Re	2.99	-6.55
KPLC	12.79	-2.89
Kenya Airways	3.74	-2.15

Top Foreign Net Inflows

Stock	Share Price	Net Inflows (Kes. Mn)
Safaricom	28.60	201.02
Equity Group	55.95	52.62
KCB Group	54.25	27.19
DTB Group	89.77	3.18
Flame Tree Group	1.56	0.00

Market Turnover

Sector	Mkt Turnover (Kes. Mn)
Telecommunication	801.35
Banking	356.37
Energy & Petroleum	65.18
Insurance	44.45
Manufacturing & Allied	8.43
Commercial & Services	4.73
Investment Services	3.25
Agricultural	2.15
Investment	2.15
Exchange Traded Funds	0.82
Construction & Allied	0.17
Automobiles & Accessories	0.08

MARKET SUMMARY

SECTOR	Share Price 28-Aug	Share Price 29-Aug	% Change	YTD % Change	Market Turnover (Kes. Mn)
AGRICULTURAL					
Eaagads Ltd	23.40	21.40	-8.55%	78.33%	0.08
Kakuzi Plc	387.00	387.00	0.00%	-1.40%	0.00
Kapchorua Tea Kenya	329.00	327.00	-0.61%	36.68%	0.42
The Limuru Tea Co. Plc	310.25	310.25	0.00%	-11.36%	0.00
Sasini Plc	17.70	17.05	-3.67%	13.67%	0.24
Williamson Tea Kenya Plc	245.00	250.50	2.24%	11.46%	1.41
AUTOMOBILES & ACCESSORIES					
Car & General (K) Ltd	30.40	31.40	3.29%	25.60%	0.08
BANKING					
ABSA Group	20.00	20.10	0.50%	6.63%	5.91
BK Group	40.25	40.80	1.37%	16.57%	0.05
DTB Group	90.00	89.75	-0.28%	34.46%	10.65
Equity Group	56.00	56.00	0.00%	16.67%	55.39
HF Group	9.54	9.58	0.42%	108.26%	3.66
I&M Group	38.40	38.65	0.65%	7.36%	4.01

KCB Group	54.00	54.25	0.46%	27.95%	72.00
NCBA Group	63.00	64.25	1.98%	25.98%	29.47
Stanbic Holdings	184.00	182.50	-0.82%	30.59%	50.23
StanChart Bank Kenya	318.00	320.00	0.63%	12.18%	107.71
Co-op Bank Group	17.65	17.80	0.85%	2.01%	17.28

COMMERCIAL AND SERVICES

Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.36	1.40	2.94%	19.66%	0.09
Express Kenya	6.02	6.62	9.97%	83.89%	0.02
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	3.84	3.74	-2.60%	-2.35%	3.33
Longhorn Publishers	2.96	2.99	1.01%	30.00%	0.04
Nairobi Business Ventures	1.67	1.62	-2.99%	-19.40%	0.33
Nation Media Group	13.50	13.30	-1.48%	-7.64%	0.06
Sameer Africa	15.05	15.65	3.99%	541.39%	0.74
Standard Group	6.28	6.32	0.64%	26.65%	0.00
TPS Eastern Africa Ltd	13.95	14.70	5.38%	-7.26%	0.01
Uchumi Supermarket	0.30	0.30	0.00%	87.50%	0.03
WPP Scangroup	2.86	2.84	-0.70%	13.15%	0.07

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	48.30	47.85	-0.93%	41.15%	0.07
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%	0.10

ENERGY & PETROLEUM

KenGen Co.	8.28	8.76	5.80%	133.60%	43.96
KPLC Ord 2.50	12.70	12.80	0.79%	147.10%	12.87
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	33.50	34.95	4.33%	71.74%	0.91
Umeme Ltd	9.56	9.50	-0.63%	-43.11%	7.44

INSURANCE

Britam Holdings	8.84	9.02	2.04%	54.98%	1.25
CIC Insurance Group	4.78	4.73	-1.05%	121.03%	1.66

Jubilee Holdings Ltd	288.50	294.50	2.08%	68.53%	2.25
Kenya Re	2.97	2.99	0.67%	121.48%	39.00
Liberty Kenya Holdings	10.40	10.90	4.81%	62.69%	0.15
Sanlam Kenya	8.52	8.20	-3.76%	65.66%	0.14

INVESTMENT

Centum Investment	13.75	13.00	-5.45%	27.45%	1.66
Home Afrika Ltd	0.86	0.88	2.33%	137.84%	0.17
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.04	5.00	-0.79%	77.94%	0.31
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

INVESTMENT SERVICES

Nairobi Securities Exchange	14.15	14.60	3.18%	147.46%	3.25
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MANUFACTURING & ALLIED

B.O.C Kenya	126.50	124.75	-1.38%	40.56%	0.33
BAT Kenya	440.25	427.25	-2.95%	13.55%	3.12
Carbacid Investments	24.60	27.00	9.76%	32.68%	0.65
EABL	220.25	218.25	-0.91%	24.36%	1.59
Flame Tree Group	1.72	1.56	-9.30%	62.50%	0.29
Africa Mega Agricorp	72.00	72.00	0.00%	2.86%	0.00
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	19.70	20.50	4.06%	36.67%	0.02
Shri Krishana Overseas	6.20	6.20	0.00%	5.08%	2.43

TELECOMMUNICATION

Safaricom	28.55	28.60	0.18%	66.28%	801.35
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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	3985.00	3985.00	0.00%	22.24%	0.00
Satrix MSCI World Feeder ETF	821.00	815.00	-0.73%	7.10%	0.82

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