

Daily Market Wrap

- Stock prices receded on Thursday, 31st July, 2025, reversing the overall market gains made during the week. The overall prices were down 2.11% on average even as all the tracking indicators recorded losses.
- The value of equities dipped by 46.82% from Kes. 680.26Mn on 30th July 2025 to Kes. 362.79Mn on 31st July 2025 as the market focus shifted away from the highly priced counters. The volumes traded dropped by 37.16% from 23.95Mn shares to 15.05Mn shares.
- The market focus turned on Telecommunication, Banking, and Manufacturing sectors transacting Kes. 160.11Mn, Kes. 96.28Mn, and Kes. 62.08Mn of market turnover respectively.
- Safaricom, EABL, and KCB Group topped in the top movers list after transacting Kes. 160.11Mn, Kes. 53.66Mn, and Kes. 31.50Mn respectively
- Despite posting 12% growth in profit after tax, EABL still features in the day's top loser's list with a 6.75% price drop from Kes. 226.00 on 30th July to Kes. 210.08 on 31st July. This is largely attributed to uncertainties associated with the regulatory environment that is likely to affect the company's performance.

Market Indicators			
Indicator	30-Jul	31-Jul	% Change
NSE10 Share Index	1613.27	1578.79	-2.14%
NSE20 Share Index	2570.81	2558.63	-0.47%
NSE25 Share Index	4199.94	4135.28	-1.54%
NASI	163.67	160.22	-2.11%
Mkt Capitalization (Bn)	2578.64	2524.22	-2.11%
Volumes Traded (Mn)	23.95	15.05	-37.16%
Equities Turnover (Mn)	680.26	361.79	-46.82%

Top Gainers 31-Jul-2025			
Stock	30-Jul	31-Jul	% Change
Sameer Africa Plc	7.76	8.52	9.79%
E.A.Portland Cement	44.60	47.5	6.50%
Flame Tree Group Holdings	1.20	1.26	5.00%
Olympia Capital Holdings	4.03	4.23	4.96%
Longhorn Publishers	2.46	2.58	4.88%

Top Movers 31-Jul-2025		
Counter	Price	Value (Kes.Mn)
Safaricom Plc	26.30	160.11
East African Breweries	210.75	53.66
KCB Group Plc	47.40	31.50
Equity Group Holdings	50.50	21.57
KenGen Co. Plc	7.36	14.64

Top Losers 31-Jul-2025			
Stock	30-Jul	31-Jul	% Change
East African Breweries	226	210.75	-6.75%
Shri Krishana Overseas	6.26	5.92	-5.43%
Safaricom	27.4	26.3	-4.01%
Nation Media Group	13.7	13.4	-2.19%
Kapchorua Tea	345	339.5	-1.59%

Market Turnover 31 July 2025

Sector	Turnover (Mn)
Telecommunication	160.11
Banking	96.28
Manufacturing	62.08
Energy and Petroleum	25.42
Insurance	7.10
Commercial and Services	5.97
Agriculture	3.98
Investment Services	0.20
Investment	0.20
Construction and Allied	0.11

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