

Daily Market Wrap

- **Market Indicators:** The equities market closed on a positive note, with all major indices edging higher except the Banking Index. NASI rose 1.12% to 172.24, NSE 10 gained 0.16% to 1,740.24, NSE 20 advanced 0.39% to 2,950.65, and NSE 25 climbed 0.86% to 4,612.06. The Banking Index eased 0.87% to 162.74. Market capitalization increased to Kes. 2,713.59 Bn, while total equities turnover fell 11.59% to Kes. 272.77 Mn.
- **Top Gainers/Losers:** Shri Krishna Overseas (+9.97%) led the gainers, followed by NCBA Group (+7.97%) and Longhorn Publishers (+5.67%). On the losing end, Kapchorua Tea (-9.96%) and Williamson Tea (-9.87%) topped the decliners, while Kenya Power (-5.81%) also slipped on profit-taking.
- **Top Movers:** Safaricom dominated trading with Kes. 104.05Mn in turnover, followed by KCB Group (Kes. 34.68Mn) and KenGen (Kes. 33.37Mn), underscoring continued interest in the telecom and banking sectors.
- **Foreign Participation:** Foreign investors were net buyers, posting inflows in Safaricom (+Kes. 36.62Mn), KCB Group (+Kes. 11.39Mn), and Equity Group (+Kes. 8.95Mn), while outflows were seen in Absa NewGold ETF (-Kes. 32.82Mn) and KenGen (-Kes. 8.39Mn).
- **Bonds Market:** Activity in the bonds segment softened, with turnover declining 31.96% to Kes. 7.45Bn from Kes. 10.95Bn in the previous session.
- **Market Update:** Kenyans will enjoy another month of stable fuel prices, with EPRA maintaining Super Petrol at Kes. 184.52, Diesel at Kes. 171.47, and Kerosene at Kes. 154.78 in Nairobi, and similar stability across major towns. Last month saw minor reductions, while July's hike was linked to higher global freight costs. Looking ahead, steady international oil prices and controlled import costs suggest fuel prices are likely to remain stable in the near term, supporting predictable operating costs for businesses and consumers alike. This stability is expected to provide a positive environment for consumer spending and overall market confidence.

Corporate Actions:

- **Absa Bank (K) Plc:** Interim dividend Kes. 0.20/share; books closed 19-Sep-25; payment 15-Oct-25
- **EABL Plc:** Final dividend Kes. 5.50/share; books closed 16-Sep-25; payment 28-Oct-25

Market Activity Summary Tables

Market Indicators			
Indicator	Previous day	Current day	%Change
NASI	171.21	172.24	0.60%
NSE 10	1748.08	1740.24	-0.45%
NSE 20	2935.11	2950.65	0.53%
NSE 25	4564.51	4612.06	1.04%
Bank Index	165.59	162.74	-1.72%
Market Capitalization (Bn)	2697.36	2713.59	0.60%
Total Shares Traded (Mn)	20.41	17.98	-11.91%
Total Equities Turnover (Mn)	308.06	272.77	-11.46%
Bond Turnover (Bn)	5.56	7.45	33.99%

Top Movers			
Stock	Share Price 14-Oct	Share Price 15-Oct	Mkt Turnover (Kes. Mn)
Safaricom	26.00	26.55	104.05
KCB Group	57.50	57.00	34.68
KenGen	9.10	9.10	33.37
Kenya Power	12.90	12.15	32.48
Kenya Re	3.01	3.00	17.64

Top Gainers			
Stock	Share Price 14-Oct	Share Price 15-Oct	%Change
Shri Krishna	7.42	8.16	9.97%
NCBA Group	75.25	81.25	7.97%
Longhorn	3.00	3.17	5.67%
Sameer Africa	13.55	14.10	4.06%
CIC Insurance	4.48	4.65	3.79%

Top Losers			
Stock	Share Price 14-Oct	Share Price 15-Oct	%Change
Kapchorua Tea	394.25	355.00	-9.96%
Williamson Tea Kenya	238.00	214.50	-9.87%
Kenya Power Ord.	12.90	12.15	-5.81%
HF Group	10.65	10.05	-5.63%
Umeme Ltd	8.50	8.24	-3.06%

Top Foreign Buys		
Stock	Share Price 15-Oct	Foreign Buys (Kes. Mn)
Safaricom	26.55	66.28
KCB Group	57.00	11.39
Equity Group	58.75	8.95
Kenya Power	12.15	6.14
Jubilee Holdings	324.75	4.80

Top Foreign Sells		
Stock	Share Price 15-Oct	Foreign Sells (Kes. Mn)
Absa NewGold ETF	5090.00	33.07
Safaricom	26.55	29.66
KenGen	9.10	9.10
NCBA Group	81.25	1.40
Stanbic Holdings	199.00	1.36

Top Foreign Net Inflows		
Stock	Share Price 15-Oct	Net inflows (Kes. Mn)
Safaricom	26.55	36.62
KCB Group	57.00	11.39
Equity Group	58.75	8.95
Kenya Power Ord.	12.15	6.12
Jubilee Holdings	324.75	4.10

Top Foreign Net Outflows		
Stock	Share Price 15-Oct	Net Outflows (Kes. Mn)
Absa NewGold ETF	5090.00	-32.82
KenGen	9.10	-8.39
Stanbic Holdings	199.00	-1.36
NCBA Group	81.25	-1.32
Kenya Re	3.00	-1.06

MARKET SUMMARY

Stock	Share Price 14-Oct	Share Price 15-Oct	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Dividend Yield
AGRICULTURAL						
Eaagads	20.70	20.40	-1.45%	70.00%	0.26	-
Kakuzi Plc	401.50	401.50	0.00%	2.29%	0.12	1.99%
Kapchorua Tea	394.25	355.00	-9.96%	48.38%	0.84	7.04%
Limuru Tea	376.75	376.75	0.00%	7.64%	0.01	-
Sasini Plc	18.45	18.45	0.00%	23.00%	0.29	5.42%
Williamson Tea Kenya	238.00	214.50	-9.87%	-4.56%	1.35	11.66%

AUTOMOBILES & ACCESSORIES

Car & General (K)	52.25	52.25	0.00%	109.00%	1.48	1.53%
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BANKING

ABSA Bank Kenya	21.85	21.95	0.46%	16.45%	2.29	7.97%
BK Group	41.75	42.35	1.44%	21.00%	15.78	6.19%
DTB Group	100.50	104.00	3.48%	55.81%	4.13	6.73%
Equity Group	59.00	58.75	-0.42%	22.40%	2.97	7.23%
HF Group	10.65	10.05	-5.63%	118.48%	1.49	-
I&M Group	42.25	42.15	-0.24%	17.08%	2.40	7.12%
KCB Group	57.50	57.00	-0.87%	34.43%	34.68	5.26%
NCBA Group	75.25	81.25	7.97%	59.31%	2.78	6.77%
Stanbic Holdings	199.00	199.00	0.00%	42.40%	9.50	10.42%
Stan Chart Bank	282.25	289.50	2.57%	1.49%	5.63	12.78%
Co-op Bank Group	19.70	19.70	0.00%	12.89%	3.87	7.61%

COMMERCIAL AND SERVICES

Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	-
Eveready East Africa	1.36	1.33	-2.21%	13.68%	0.01	-
Express Kenya	7.38	7.16	-2.98%	98.89%	0.47	-
Homeboyz Entertainment Plc	4.66	4.66	0.00%	0.00%	0.00	-
Kenya Airways	3.89	3.78	-2.83%	-1.31%	0.14	-
Longhorn Publishers Plc	3.00	3.17	5.67%	37.83%	0.02	-
Nairobi Business Ventures	1.63	1.60	-1.84%	-20.40%	0.06	-
Nation Media Group	13.30	13.35	0.38%	-7.29%	0.04	-
Sameer Africa	13.55	14.10	4.06%	477.87%	0.44	-
Standard Group	6.26	6.40	2.24%	28.26%	0.04	-
TPS Eastern Africa	16.00	15.55	-2.81%	-1.89%	0.05	2.25%
Uchumi Supermarket	0.39	0.39	0.00%	143.75%	0.03	-
WPP Scangroup	2.81	2.86	1.78%	13.94%	0.07	-

CONSTRUCTION & ALLIED

Athi River Mining	5.55	5.55	0.00%	0.00%	0.00	-
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Bamburi Cement	54.00	54.00	0.00%	-1.82%	0.00	-
Crown Paints Kenya	56.50	58.50	3.54%	72.57%	0.02	5.13%
E.A.Cables	1.71	1.71	0.00%	61.32%	0.00	-
E.A.Portland Cement	57.50	58.25	1.30%	100.52%	0.06	1.72%

ENERGY & PETROLEUM

KenGen	9.10	9.10	0.00%	142.67%	33.37	7.14%
Kenya Power Ord.	12.90	12.15	-5.81%	134.56%	32.48	5.76%
Kenya Power Pref 4	4.51	4.51	0.00%	0.00%	0.00	-
Kenya Power Pref 7	6.00	6.00	0.00%	0.00%	0.00	-
Total Energies Kenya	34.90	35.00	0.29%	71.99%	0.62	5.49%
Umeme Ltd	8.50	8.24	-3.06%	-50.66%	1.37	-

INSURANCE

Britam Plc	8.46	8.46	0.00%	45.36%	1.10	-
CIC Insurance	4.48	4.65	3.79%	117.29%	1.75	2.80%
Jubilee Holdings	320.75	324.75	1.25%	85.84%	0.65	4.16%
Kenya Re	3.01	3.00	-0.33%	122.22%	17.64	10.00%
Liberty Kenya	11.00	10.95	-0.45%	63.43%	1.03	14.61%
Sanlam Kenya	8.92	8.90	-0.22%	79.80%	0.07	-

INVESTMENT

Centum	13.95	14.05	0.72%	37.75%	1.57	2.28%
Home Afrika	1.20	1.18	-1.67%	218.92%	0.70	-
Kurwitu Ventures	1500.00	1500.00	0.00%	0.00%	0.00	-
Olympia Capital Holdings	6.80	7.04	3.53%	150.53%	0.08	-
Trans-Century	1.12	1.12	0.00%	180.00%	0.00	-

INVESTMENT SERVICES

NSE	14.75	14.70	-0.34%	149.15%	2.25	-
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MANUFACTURING & ALLIED

BOC Kenya	126.75	129.00	1.78%	45.35%	0.18	6.71%
BAT Kenya	431.75	431.75	0.00%	14.75%	3.20	11.58%
Carbacid Investments	26.45	25.85	-2.27%	27.03%	0.79	6.58%
EABL	214.25	213.00	-0.58%	21.37%	6.44	3.76%
Flame Tree Group	1.58	1.57	-0.63%	63.54%	0.29	-
Kenya Orchards	65.00	65.00	0.00%	-7.14%	0.00	-
Mumias Sugar Co.	0.27	0.27	0.00%	0.00%	0.00	-
Unga Group	24.85	25.75	3.62%	71.67%	4.44	-
Shri Krishna Overseas	7.42	8.16	9.97%	37.84%	1.16	-

TELECOMMUNICATION

Safaricom	26.00	26.55	2.12%	54.36%	104.05	4.52%
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REITs

LapTrust Imara I-REIT	20.00	20.00	0.00%	0.00%	0.00	4.10%
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EXCHANGE TRADED FUNDS

Absa NewGold ETF	5050.00	5090.00	0.79%	60.06%	0.86	-
Satrix MSCI World F. ETF	828.00	820.00	-0.97%	7.75%	0.57	-

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