

## Daily Market Wrap

- **Market Indicators:** The equities market closed on a positive note, with NASI rising 0.80% to 178.16 points, NSE 25 climbing 0.58% to 4,651.32 points, and NSE 20 gaining 0.45% to 2,985.91 points, while the NSE 10 advanced 0.16% to 1,786.22 points. Market capitalization increased by 0.80% to Kes. 2,806.88Bn. However, trading activity eased, with turnover declining 9.86% to Kes. 482.97Mn.
- **Gainers & Losers:** Williamson Tea (+10.00%) led the gainers' list, followed by Umeme (+9.98%), and Olympia Capital (+9.40%). On the flip side, Nairobi Business Ventures (-3.59%) topped the losers, with Nation Media (-2.62%), and BK Group (-2.60%) also registering declines.
- **Top Movers:** KCB Group (Kes. 98.76Mn), Equity Group (Kes. 84.67Mn), and KPLC (Kes. 28.09Mn) dominated trading activity, reflecting continued investor interest in banking and utility counters.
- **Foreign Investor Activity:** Foreign investors were net buyers, with notable inflows in KCB Group (Kes. 94.70Mn), and Equity Group (Kes. 67.01Mn). Outflows were seen in Umeme (-Kes. 1.73Mn), and Absa NewGold ETF (-Kes. 1.40Mn).
- **Bonds Market:** The secondary bond market recorded lower activity, with turnover declining by 31.20% to Kes. 8.16Bn compared to Kes. 11.86Bn in the previous session, indicating a slowdown in investor participation.
- **Market Update:** Family Bank Limited has issued a notice to hold an Extraordinary General Meeting (EGM) on 27th October 2025, seeking shareholder approval for the proposed listing of its ordinary shares on the Nairobi Securities Exchange (NSE) by way of introduction. The special resolutions to be tabled include authorizing the listing on the Main Investment Market Segment and empowering the Board to undertake all necessary steps to facilitate the process, including regulatory filings and documentation. The listing is expected to enhance the Bank's visibility in the capital markets, improve liquidity for existing shareholders, and support its strategic ambitions for growth and expansion.
- The NSE today launched its Banking Sector Index, a new benchmark for listed bank stocks, which closed at **165.59**. It aims to boost investor insight, support sector analysis, and pave the way for products like ETFs.

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### Corporate Actions:

- **NCBA Group:** Interim dividend Kes. 2.50/share; books closed 18-Sep-25; payment 02-Oct-25.
- **Stan Chart Bank:** Interim dividend Kes. 8.00/share; books closed 11-Sep-25; payment 07-Oct-25
- **Jubilee Holdings:** Interim dividend Kes. 2.00/share; books closed 05-Sep-25; payment 09-Oct-25
- **Absa Bank (K) Plc:** Interim dividend Kes. 0.20/share; books closed 19-Sep-25; payment 15-Oct-25

### Market Activity Summary Tables

Market Indicators			
Indicator	30-Sep	01-Oct	%Change
NSE10 Share Index	1783.31	1786.22	0.16%
NSE20 Share Index	2972.64	2985.91	0.45%
NSE25 Share Index	4624.72	4651.32	0.58%
NASI	176.74	178.16	0.80%
Mkt Capitalization (Bn)	2784.47	2806.88	0.80%
Volumes Traded (Mn)	24.85	20.25	-18.51%
Equities Turnover (Mn)	535.80	482.97	-9.86%
Bonds Turnover (Bn)	11.86	8.16	-31.20%

Top Movers			
Stock	Share Price 30-sep	Share Price 01-Oct	Mkt Turnover (Kes. Mn)
KCB Group	56.75	56.50	98.76
Equity Group	58.00	58.00	84.67
KPLC Ord 2.50	13.95	14.40	28.09
Olympia Capital	5.96	6.52	20.33
KenGen Co.	8.62	8.66	12.67

Top Gainers			
Stock	Share Price 30-sep	Share Price 01-Oct	%Change
Williamson Tea	275.00	302.50	10.00%
Umeme Ltd	8.02	8.82	9.98%
Olympia Capital	5.96	6.52	9.40%
Kapchorua Tea	365.50	399.75	9.37%
TPS Eastern Africa	15.00	16.40	9.33%

Top Losers			
Stock	Share Price 30-sep	Share Price 01-Oct	%Change
Nairobi Business V.	1.67	1.61	-3.59%
Nation Media Group	13.35	13.00	-2.62%
BK Group	38.40	37.40	-2.60%
Crown Paints Kenya	59.50	58.00	-2.52%
Shri Krishana Overseas	8.26	8.06	-2.42%

Top Foreign Buys		
Stock	Share Price 01-Oct	Foreign Buys (Kes. Mn)
Safaricom	29.30	175.82
KCB Group	56.50	95.22
Equity Group	58.00	67.01
DTB Group	104.75	6.60
EABL Plc	211.75	5.41

Top Foreign Sells		
Stock	Share Price 01-Oct	Foreign Sells (Kes. Mn)
Safaricom	29.30	171.34
Umeme Ltd	8.82	2.17
Stanbic	194.25	2.13
EABL Plc	211.75	1.96
DTB Group	104.75	1.80

Top Foreign Net Inflows		
Stock	Share Price 01-Oct	Net Inflows (Kes. Mn)
KCB Group	56.50	94.70
Equity Group	58.00	67.01
DTB Group	104.75	4.80
Safaricom	29.30	4.49
EABL Plc	211.75	3.45

Top Foreign Net Outflows		
Stock	Share Price 01-Oct	Net Outflows (Kes. Mn)
Umeme Ltd	8.82	-1.73
Absa NewGold ETF	4680.00	-1.40
Kenya Airways	3.94	-0.94
Jubilee Holdings	319.75	-0.77
WPP ScanGroup	2.87	-0.19

### MARKET SUMMARY

SECTOR	Share Price 30-Sep	Share Price 01-Oct	%Change	YTD % Change	Market Turnover (Kes. Mn)
<b>AGRICULTURAL</b>					
Eaagads Ltd	20.55	20.40	-0.73%	70.00%	0.01
Kakuzi Plc	413.50	422.25	2.12%	7.58%	0.05
Kapchorua Tea Kenya	365.50	399.75	9.37%	67.08%	1.04
The Limuru Tea Co. Plc	380.00	380.00	0.00%	8.57%	0.10
Sasini Plc	18.55	18.50	-0.27%	23.33%	0.31
Williamson Tea Kenya Plc	275.00	302.50	10.00%	34.59%	1.32
<b>AUTOMOBILES &amp; ACCESSORIES</b>					
Car & General (K) Ltd	38.85	41.35	6.44%	65.40%	0.28
<b>BANKING</b>					
ABSA Group	21.50	21.50	0.00%	14.06%	2.50
BK Group	38.40	37.40	-2.60%	6.86%	0.03
DTB Group	104.50	104.75	0.24%	56.93%	8.45
Equity Group	58.00	58.00	0.00%	20.83%	84.67
HF Group	10.65	10.70	0.47%	132.61%	1.46
I&M Group	43.00	42.95	-0.12%	19.31%	2.78
KCB Group	56.75	56.50	-0.44%	33.25%	98.76
NCBA Group	69.00	69.75	1.09%	36.76%	1.43
Stanbic Holdings	184.25	194.25	5.43%	39.00%	4.63
StanChart Bank Kenya	284.00	284.25	0.09%	-0.35%	4.05
Co-op Bank Group	21.40	21.00	-1.87%	20.34%	1.57
<b>COMMERCIAL AND SERVICES</b>					
Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00
Eveready East Africa	1.41	1.40	-0.71%	19.66%	0.00
Express Kenya	7.92	7.92	0.00%	120.00%	0.06
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00
Kenya Airways Ltd	3.91	3.94	0.77%	2.87%	1.47
Longhorn Publishers	3.02	3.03	0.33%	31.74%	0.00
Nairobi Business Ventures	1.67	1.61	-3.59%	-19.90%	0.06
Nation Media Group	13.35	13.00	-2.62%	-9.72%	0.63
Sameer Africa	15.00	14.80	-1.33%	506.56%	0.05
Standard Group	5.90	5.90	0.00%	18.24%	0.00

TPS Eastern Africa Ltd	15.00	16.40	9.33%	3.47%	0.02
Uchumi Supermarket	0.38	0.41	7.89%	156.25%	0.21
WPP Scangroup	2.91	2.87	-1.37%	14.34%	0.20

### 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	59.50	58.00	-2.52%	71.09%	0.17
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00
E.A.Portland Cement	58.75	58.00	-1.28%	99.66%	0.02

### ENERGY & PETROLEUM

KenGen Co.	8.62	8.66	0.46%	130.93%	12.67
KPLC Ord 2.50	13.95	14.40	3.23%	177.99%	28.09
KPLC 4% Pref 20.00	4.51	4.51	0.00%	12.75%	0.00
KPLC 7% Pref 20.00	6.00	6.00	0.00%	0.00%	0.00
TotalEnergies Marketing Kenya	34.00	34.05	0.15%	67.32%	0.77
Umeme Ltd	8.02	8.82	9.98%	-47.19%	2.39

### INSURANCE

Britam Holdings	8.92	8.88	-0.45%	52.58%	0.63
CIC Insurance Group	4.85	4.84	-0.21%	126.17%	0.70
Jubilee Holdings Ltd	314.25	319.75	1.75%	82.98%	0.81
Kenya Re	3.16	3.16	0.00%	134.07%	3.83
Liberty Kenya Holdings	10.95	11.00	0.46%	64.18%	0.14
Sanlam Kenya	9.00	9.22	2.44%	86.26%	0.00

### INVESTMENT

Centum Investment	15.25	15.55	1.97%	52.45%	0.27
Home Afrika Ltd	1.24	1.25	0.81%	237.84%	0.89
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00
Olympia Capital Holdings Ltd	5.96	6.52	9.40%	132.03%	20.33
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00

### INVESTMENT SERVICES

Nairobi Securities Exchange	14.75	14.80	0.34%	150.85%	0.53
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### MANUFACTURING & ALLIED

B.O.C Kenya	121.00	120.00	-0.83%	35.21%	0.09
BAT Kenya	427.50	428.25	0.18%	13.82%	3.44
Carbacid Investments	25.70	26.80	4.28%	31.70%	0.77
EABL	211.00	211.75	0.36%	20.66%	8.33
Flame Tree Group	1.60	1.68	5.00%	75.00%	0.16
Africa Mega Agricorp	65.00	65.00	0.00%	-7.14%	0.00
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00
Unga Group Ltd	24.10	24.00	-0.41%	60.00%	0.02
Shri Krishana Overseas	8.26	8.06	-2.42%	36.61%	0.25

### TELECOMMUNICATION

Safaricom	28.90	29.30	1.38%	70.35%	0.00
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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	4595.00	4680.00	1.85%	43.56%	1.40
Satrix MSCI World Feeder ETF	830.00	811.00	-2.29%	6.57%	0.13

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