

Daily Market Wrap

- **Market Indicators:** The equities market closed positive, with NASI rising 0.36% to 178.36, NSE 10 up 0.15% to 1,783.78, NSE 20 advancing 0.13% to 3,010.70, and NSE 25 gaining 0.65% to 4,776.45. The Banking Index eased 0.96% to 157.60. Market capitalization increased to Kes. 2,809.98Bn, while equities turnover declined 12.84% to Kes. 865.23Mn.
- **Top Gainers/Losers:** NCBA Group led gainers, climbing 5.48%, followed by WPP Scangroup at 5.45% and Flame Tree Group at 4.96%, buoyed by renewed investor demand. On the losing end, Kapchorua Tea dropped 9.94%, Express Kenya declined 7.75%, and BK Group shed 5.59%.
- **Top Movers:** Equity Group dominated trading with Kes. 480.49Mn, followed by Safaricom at Kes. 119.07Mn and KCB Group at Kes. 76.56Mn, indicating sustained interest in large-cap banking and telecom stocks.
- **Foreign Participation:** Foreign investors were net sellers, with notable outflows from Safaricom (Kes. 31.77Mn), Stanbic Holdings (Kes. 19.88Mn), and Absa NewGold ETF (Kes. 2.52Mn). Inflows were concentrated in Equity Group (Kes. 31.04Mn), EABL (Kes. 10.45Mn), and KCB Group (Kes. 9.83Mn), showing selective foreign accumulation in banking and consumer stocks.
- **Bonds Market:** The secondary bond market segment recorded a sharp rise in activity, with turnover jumping 665.81% to Kes. 20.83Bn, reflecting heightened investor appetite for long-dated government papers after a recent decline.

Corporate Actions:

- **EABL Plc:** Final dividend Kes. 5.50/share; books closed 16-Sep-25; payment 28-Oct-25
- **KCB Group:** Interim & Special dividend Kes. 4.00/share; books closed 3-Sep-25; payment 11-Nov-25
- **Centum Plc:** Final dividend Kes. 0.32/share; books closed 9-Oct-25; payment 19-Dec-25

Market Activity Summary Tables

Market Indicators			
Indicator	Previous day	Current day	%Change
NASI	177.72	178.36	0.36%
NSE 10	1781.09	1783.78	0.15%
NSE 20	3006.77	3010.70	0.13%
NSE 25	4745.80	4776.45	0.65%
Bank Index	159.12	157.60	-0.96%
Market Capitalisation (Bn)	2800.00	2809.98	0.36%
Total Shares Traded (Mn)	30.44	23.98	-21.22%
Total Equities Turnover (Mn)	992.73	865.23	-12.84%
Bond Turnover (Bn)	2.72	20.83	665.81%

Top Movers			
Stock	Share Price 21-Oct	Share Price 22-Oct	Mkt Turnover (Kes. Mn)
Equity Group	60.00	60.00	480.49
Safaricom	27.95	27.95	119.07
KCB Group	57.75	58.25	76.56
Co-op Bank	20.00	20.00	34.53
EABL	215.00	215.25	24.83

Top Gainers			
Stock	Share Price 21-Oct	Share Price 22-Oct	%Change
NCBA Group	91.25	96.25	5.48%
WPP Scangroup	2.75	2.90	5.45%
Flame Tree Group	1.41	1.48	4.96%
TPS Eastern Africa	16.40	17.00	3.66%
Williamson Tea Kenya	191.25	196.75	2.88%

Top Losers			
Stock	Share Price 22-Oct	Share Price 22-Oct	%Change
Kapchorua Tea	319.50	287.75	-9.94%
Express Kenya	7.48	6.90	-7.75%
BK Group	42.90	40.50	-5.59%
E.A.Portland Cement	58.25	55.00	-5.58%
Longhorn Publishers	3.02	2.86	-5.30%

Top Foreign Buys		
Stock	Share Price 22-Oct	Foreign Buys (Kes. Mn)
Equity Group	60.00	331.76
KCB Group	58.25	68.08
Safaricom	27.95	14.97
EABL	215.25	10.45
Absa NewGold ETF	5045.00	3.76

Top Foreign Sells		
Stock	Share Price 22-Oct	Foreign Sells (Kes. Mn)
Equity Group	60.00	300.72
KCB Group	58.25	58.25
Safaricom	27.95	46.74
Stanbic Holdings	198.75	19.88
Absa NewGold ETF	5045.00	6.28

Top Foreign Net Inflows		
Stock	Share Price 22-Oct	Net inflows (Kes. Mn)
Equity Group	60.00	31.04
EABL	215.25	10.45
KCB Group	58.25	9.83
ABSA Bank Kenya	22.40	0.10
Stan Chart Bank	290.00	0.09

Top Foreign Net Outflows		
Stock	Share Price 22-Oct	Net inflows (Kes. Mn)
Safaricom	27.95	-31.77
Stanbic Holdings	198.75	-19.88
Absa NewGold ETF	5045.00	-2.52
Kenya Power Ord.	13.70	-0.79
DTB Group	103.75	-0.51

MARKET SUMMARY

Stock	Share Price 21-Oct	Share Price 22-Oct	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Dividend Yield
AGRICULTURAL						
Eaagads	20.55	20.55	0.00%	71.25%	0.00	-
Kakuzi Plc	425.00	425.00	0.00%	8.28%	0.00	1.88%
Kapchorua Tea	319.50	287.75	-9.94%	20.27%	0.08	8.69%
Limuru Tea	376.75	376.75	0.00%	7.64%	0.00	-
Sasini Plc	18.15	18.50	1.93%	23.33%	0.17	5.41%
Williamson Tea Kenya	191.25	196.75	2.88%	-12.46%	0.26	12.71%

AUTOMOBILES & ACCESSORIES

Car & General (K)	53.25	53.50	0.47%	114.00%	0.92	1.50%
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BANKING

ABSA Bank Kenya	22.40	22.40	0.00%	18.83%	9.12	7.81%
BK Group	42.90	40.50	-5.59%	15.71%	0.66	6.47%
DTB Group	103.75	103.75	0.00%	55.43%	0.79	6.75%
Equity Group	60.00	60.00	0.00%	25.00%	480.49	7.08%
HF Group	10.25	10.15	-0.98%	120.65%	1.16	-
I&M Group	41.95	42.30	0.83%	17.50%	11.28	7.09%
KCB Group	57.75	58.25	0.87%	37.38%	76.56	5.15%
NCBA Group	91.25	96.25	5.48%	88.73%	19.30	5.71%
Stanbic Holdings	198.50	198.75	0.13%	42.22%	21.59	10.44%
Stan Chart Bank	285.50	290.00	1.58%	1.67%	15.42	12.76%
Co-op Bank Group	20.00	20.00	0.00%	14.61%	34.53	7.50%

COMMERCIAL AND SERVICES

Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	-
Eveready East Africa	1.32	1.28	-3.03%	9.40%	0.09	-
Express Kenya	7.48	6.90	-7.75%	91.67%	0.02	-
Homeboyz Entertainment Plc	4.66	4.66	0.00%	0.00%	0.00	-
Kenya Airways	3.85	3.85	0.00%	0.52%	0.48	-
Longhorn Publishers Plc	3.02	2.86	-5.30%	24.35%	0.03	-
Nairobi Business Ventures	1.62	1.62	0.00%	-19.40%	0.03	-
Nation Media Group	13.50	13.45	-0.37%	-6.60%	0.06	-
Sameer Africa	13.75	13.75	0.00%	463.52%	0.20	-
Standard Group	6.38	6.16	-3.45%	23.45%	0.00	-
TPS Eastern Africa	16.40	17.00	3.66%	7.26%	0.04	2.06%
Uchumi Supermarket	0.37	0.37	0.00%	131.25%	0.02	-
WPP Scangroup	2.75	2.90	5.45%	15.54%	0.61	-

CONSTRUCTION & ALLIED

Athi River Mining	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	54.00	54.00	0.00%	59.29%	0.16	5.56%
E.A.Cables	1.71	1.71	0.00%	61.32%	0.00	-
E.A.Portland Cement	58.25	55.00	-5.58%	89.33%	0.01	1.82%

ENERGY & PETROLEUM

KenGen	9.20	9.18	-0.22%	144.80%	23.22	7.08%
Kenya Power Ord.	13.70	13.70	0.00%	164.48%	6.39	5.11%
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	33.75	34.50	2.22%	69.53%	0.06	5.57%
Umeme Ltd	8.00	7.88	-1.50%	-52.81%	0.48	-

INSURANCE

Britam Plc	8.70	8.56	-1.61%	47.08%	3.20	-
CIC Insurance	4.51	4.50	-0.22%	110.28%	1.09	2.89%
Jubilee Holdings	316.25	315.00	-0.40%	80.26%	0.19	4.29%
Kenya Re	3.02	3.01	-0.33%	122.96%	6.87	9.97%
Liberty Kenya	10.90	10.95	0.46%	63.43%	0.02	14.61%
Sanlam Kenya	9.06	9.00	-0.66%	81.82%	0.29	-

INVESTMENT

Centum	13.90	14.05	1.08%	37.75%	0.53	2.28%
Home Afrika	1.19	1.19	0.00%	221.62%	0.82	-
Kurwitu Ventures	1500.00	1500.00	0.00%	0.00%	0.00	-
Olympia Capital Holdings	6.98	7.00	0.29%	149.11%	0.26	-
Trans-Century	1.12	1.12	0.00%	180.00%	0.00	-

INVESTMENT SERVICES

NSE	14.65	14.60	-0.34%	147.46%	0.25	-
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MANUFACTURING & ALLIED

BOC Kenya	133.75	133.25	-0.37%	50.14%	0.23	6.49%
BAT Kenya	430.50	438.50	1.86%	16.54%	2.95	11.40%
Carbacid Investments	26.50	26.35	-0.57%	29.48%	0.18	6.45%
EABL	215.00	215.25	0.12%	22.65%	24.83	3.72%
Flame Tree Group	1.41	1.48	4.96%	54.17%	0.06	-
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	23.40	23.35	-0.21%	55.67%	0.11	-
Shri Krishna Overseas	8.00	8.06	0.75%	36.15%	0.00	-

TELECOMMUNICATION

Safaricom	27.95	27.95	0.00%	62.50%	119.07	4.29%
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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	5300.00	5045.00	-4.81%	58.65%	7.56	-
Satrix MSCI World F. ETF	820.00	835.00	1.83%	9.72%	0.11	-

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