

Daily Market Wrap

- **Market Indicators:** The equities market opened the week on a bearish note, with all major indices closing lower except the Banking Index. NASI fell 0.46% to 177.67, while the NSE 10, NSE 20, and NSE 25 declined 0.17%, 0.29%, and 0.20% to 1,787.02, 3,022.14, and 4,659.81, respectively. The Banking Index inched up 0.09% to 164.75. Market capitalization dropped to Kes. 2,799.18Bn, while equities turnover declined sharply by 55.75% to Kes. 213.97Mn.
- **Gainers/Losers:** Car & General (K) Ltd led the gainers, rising 7.80% to Kes. 49.05, followed by Kapchorua Tea Kenya (+7.19%) and Eaagads Ltd (+3.59%). On the other hand, Express Kenya topped the losers, dropping 5.50% to Kes. 7.56, while KenGen and TPS Eastern Africa fell 4.20% and 3.89%, respectively.
- **Top Movers:** KPLC dominated trading with a turnover of Kes. 52.87Mn, followed by Absa Group at Kes. 36.94Mn and KenGen at Kes. 22.68Mn, reflecting concentrated trading activity among key blue-chip counters.
- **Foreign Participation:** Foreign investors were net sellers, driven by notable outflows from Absa NewGold ETF (-Kes. 95.20Mn), Safaricom (-Kes. 4.06Mn), and Umeme Ltd (-Kes. 1.67Mn). Inflows were recorded in Equity Group (Kes. 15.16Mn), EABL (Kes. 4.23Mn), and KCB Group (Kes. 2.65Mn), partially offsetting the overall foreign sell-off.
- **Bonds Market:** The bonds market posted a notable rebound, with turnover increasing 95.80% to Kes. 5.60Bn from Kes. 2.86Bn in the previous session, reflecting improved investor participation after recent declines.

Corporate Actions:

- **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	03-Oct	06-Oct	%Change
NSE10 Share Index	1790.15	1787.02	-0.17%
NSE20 Share Index	3030.95	3022.14	-0.29%
NSE25 Share Index	4668.95	4659.81	-0.20%
NASI	178.50	177.67	-0.46%
Banking Index	164.60	164.75	0.09%
Mkt Capitalization (Bn)	2812.18	2799.18	-0.46%
Volumes Traded (Mn)	20.50	15.05	-26.59%
Equities Turnover (Mn)	483.55	213.97	-55.75%
Bonds Turnover (Bn)	2.86	5.60	95.80%

Top Movers			
Stock	Share Price 3-Oct	Share Price 6-Oct	Mkt Turnover (Kes. Mn)
KPLC Ord 2.50	15.50	15.15	52.87
ABSA Group	22.05	22.05	36.94
KenGen Co.	10.00	9.58	22.68
Equity Group	58.25	58.50	20.38
Safaricom	28.90	28.65	17.14

Top Gainers			
Stock	Share Price 3-Oct	Share Price 6-Oct	%Change
Car & General (K) Ltd	45.50	49.05	7.80%
Kapchorua Tea Kenya	385.75	413.50	7.19%
Eaagads Ltd	20.90	21.65	3.59%
Williamson Tea Kenya	325.75	334.50	2.69%
Nation Media Group	13.25	13.60	2.64%

Top Losers			
Stock	Share Price 3-Oct	Share Price 6-Oct	%Change
Express Kenya	8.00	7.56	-5.50%
KenGen Co.	10.00	9.58	-4.20%
TPS Eastern Africa	16.70	16.05	-3.89%
Nairobi Business V.	1.69	1.63	-3.55%
KPLC Ord 2.50	15.50	15.15	-2.26%

Top Foreign Buys		
Stock	Share Price 06-Oct	Foreign Buys (Kes. Mn)
Equity Group	58.50	18.09
EABL Plc	214.00	7.28
Jubilee Holdings	325.00	3.29
Safaricom	28.65	2.89
KCB Group	56.50	2.65

Top Foreign Sells		
Stock	Share Price 06-Oct	Foreign Sells (Kes. Mn)
Absa NewGold ETF	4755.00	95.20
Safaricom	28.65	6.95
Jubilee Holdings	325.00	3.28
EABL Plc	214.00	3.05
Equity Group	58.50	2.92

Top Foreign Net Inflows		
Stock	Share Price 06-Oct	Net Inflows (Kes. Mn)
Equity Group	58.50	15.16
EABL Plc	214.00	4.23
KCB Group	56.50	2.65
Stan Chart Group	283.75	1.60
KPLC.Ord.	15.15	0.37

Top Foreign Net Outflows		
Stock	Share Price 06-Oct	Net Outflows (Kes. Mn)
Absa NewGold ETF	4755.00	-95.20
Safaricom	28.65	-4.06
Umeme Ltd	8.74	-1.67
Satrix MSCI World F. ETF	846.00	-0.84
Kenya Airways	3.89	-0.51

MARKET SUMMARY

SECTOR	Share Price 03-Oct	Share Price 06-Oct	%Change	YTD % Change	Market Turnover (Kes. Mn)	Dividend Yield
AGRICULTURAL						
Eaagads Ltd	20.90	21.65	3.59%	80.42%	0.13	0.00%
Kakuzi Plc	426.00	416.75	-2.17%	6.18%	0.06	1.92%
Kapchorua Tea Kenya	385.75	413.50	7.19%	72.83%	0.79	6.05%
The Limuru Tea Co. Plc	380.00	380.00	0.00%	8.57%	0.06	0.26%
Sasini Plc	18.85	18.90	0.27%	26.00%	0.27	5.29%
Williamson Tea Kenya Plc	325.75	334.50	2.69%	48.83%	1.20	7.47%
AUTOMOBILES & ACCESSORIES						
Car & General (K) Ltd	45.50	49.05	7.80%	96.20%	0.13	1.63%
BANKING						
ABSA Group	22.05	22.05	0.00%	16.98%	36.94	7.94%
BK Group	38.50	38.50	0.00%	10.00%	0.15	6.81%
DTB Group	105.00	104.75	-0.24%	56.93%	0.93	6.68%
Equity Group	58.25	58.50	0.43%	21.88%	20.38	7.26%
HF Group	10.50	10.65	1.43%	131.52%	1.03	0.00%
I&M Group	42.95	42.80	-0.35%	18.89%	3.33	7.01%
KCB Group	57.00	56.50	-0.88%	33.25%	7.33	5.31%
NCBA Group	70.75	70.00	-1.06%	37.25%	1.53	7.86%
Stanbic Holdings	197.50	197.50	0.00%	41.32%	0.78	10.50%
StanChart Bank Kenya	284.00	283.75	-0.09%	-0.53%	5.73	13.04%
Co-op Bank Group	20.70	20.85	0.72%	19.48%	5.01	7.19%
COMMERCIAL AND SERVICES						
Deacons (East Africa)	0.45	0.45	0.00%	0.00%	0.00	0.00%
Eveready East Africa	1.40	1.40	0.00%	19.66%	0.03	0.00%
Express Kenya	8.00	7.56	-5.50%	110.00%	0.05	0.00%
Homeboyz Entertainment	4.66	4.66	0.00%	0.00%	0.00	0.00%
Kenya Airways Ltd	3.91	3.89	-0.51%	1.57%	0.73	0.00%
Longhorn Publishers	3.22	3.25	0.93%	41.30%	0.02	0.00%
Nairobi Business Ventures	1.69	1.63	-3.55%	-18.91%	0.43	0.00%
Nation Media Group	13.25	13.60	2.64%	-5.56%	0.05	0.00%

Sameer Africa	15.15	15.05	-0.66%	516.80%	0.26	0.00%
Standard Group	5.90	5.82	-1.36%	16.63%	0.04	0.00%
TPS Eastern Africa Ltd	16.70	16.05	-3.89%	1.26%	0.11	2.18%
Uchumi Supermarket	0.39	0.39	0.00%	143.75%	0.06	0.00%
WPP Scangroup	2.95	2.95	0.00%	17.53%	0.17	0.00%

CONSTRUCTION & ALLIED

ARM Cement Plc	5.55	5.55	0.00%	0.00%	0.00	0.00%
Bamburi Cement	54.00	54.00	0.00%	-1.82%	0.00	0.00%
Crown Paints Kenya	60.25	61.00	1.24%	79.94%	0.18	4.92%
E.A.Cables Ltd	1.71	1.71	0.00%	61.32%	0.00	0.00%
E.A.Portland Cement	59.25	59.50	0.42%	104.82%	0.01	1.68%

ENERGY & PETROLEUM

KenGen Co.	10.00	9.58	-4.20%	155.47%	22.68	6.78%
KPLC Ord 2.50	15.50	15.15	-2.26%	192.47%	52.87	4.62%
KPLC 4% Pref 20.00	4.51	4.51	0.00%	12.75%	0.00	0.00%
KPLC 7% Pref 20.00	6.00	6.00	0.00%	0.00%	0.00	0.00%
TotalEnergies Marketing Kenya	33.80	34.50	2.07%	69.53%	0.14	5.57%
Umeme Ltd	8.92	8.74	-2.02%	-47.66%	2.32	0.00%

INSURANCE

Britam Holdings	8.92	8.90	-0.22%	52.92%	0.89	0.00%
CIC Insurance Group	4.87	4.88	0.21%	128.04%	0.39	2.66%
Jubilee Holdings Ltd	322.75	325.00	0.70%	85.98%	3.35	4.15%
Kenya Re	3.19	3.17	-0.63%	134.81%	12.50	9.46%
Liberty Kenya Holdings	10.90	10.85	-0.46%	61.94%	0.06	14.75%
Sanlam Kenya	9.00	9.00	0.00%	81.82%	0.18	0.00%

INVESTMENT

Centum Investment	15.60	15.70	0.64%	53.92%	0.36	2.04%
Home Afrika Ltd	1.28	1.26	-1.56%	240.54%	0.67	0.00%
Kurwitu Ventures Ltd	1500.00	1500.00	0.00%	0.00%	0.00	0.00%
Olympia Capital Holdings Ltd	7.04	7.04	0.00%	150.53%	0.14	0.00%
Trans-Century Plc	1.12	1.12	0.00%	180.00%	0.00	0.00%

INVESTMENT SERVICES

Nairobi Securities Exchange	14.90	14.95	0.34%	153.39%	0.82	0.00%
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MANUFACTURING & ALLIED

B.O.C Kenya	125.00	124.75	-0.20%	40.56%	0.18	6.93%
BAT Kenya	428.25	433.50	1.23%	15.22%	0.37	11.53%
Carbacid Investments	26.70	26.90	0.75%	32.19%	1.08	6.32%
EABL	213.00	214.00	0.47%	21.94%	9.70	3.74%
Flame Tree Group	1.67	1.67	0.00%	73.96%	0.08	0.00%
Africa Mega Agricorp	65.00	65.00	0.00%	-7.14%	0.00	0.00%
Mumias Sugar	0.27	0.27	0.00%	0.00%	0.00	0.00%
Unga Group Ltd	22.90	23.25	1.53%	55.00%	0.07	0.00%
Shri Krishana Overseas	8.16	8.18	0.25%	38.64%	0.10	0.00%

TELECOMMUNICATION

Safaricom	28.90	28.65	-0.87%	66.57%	17.14	4.19%
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REAL ESTATE INV. TRUST

LAPTRUST IMARA I-REIT	20.00	20.00	0.00%	0.00%	0.00	4.10%
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EXCHANGE TRADED FUNDS

ABSA New Gold ETF	4680.00	4755.00	1.60%	45.86%	16.94	0.00%
Satrix MSCI World Feeder ETF	846.00	846.00	0.00%	11.17%	0.90	0.00%

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Kingdom Securities Ltd – A subsidiary of Co-operative Bank Limited. Co-operative Bank House- 5th floor, P.O Box 48231 - 00100 Nairobi, Kenya

Office: 0711049016

Email: info@kingdomsecurities.co.ke

Research Department

Stellah Swakei	sswakei@co-opbank.co.ke	+254711049152
Dennis Langat	dlangat@co-opbank.co.ke	+254 711049592
Chrisanthus Lunani	clunani@co-opbank.co.ke	+254711049973

Sales Team

Alfred Too	atoo@co-opbank.co.ke	+254 711049330
Moffat Asena	amoffat@co-opbank.co.ke	+254 711049663
Gloria Ohito	gohito@co-opbank.co.ke	+254711049993
Maritim Cheruyot	mcheruyot@co-opbank.co.ke	+254711029534

Client Service and Operation

info@kingdomsecurities.co.ke +254711049016