

Daily Market Wrap

Market Indicators: The equities market closed on a bullish note, with NASI gaining 0.42% to 189.88, NSE 10 adding 1.50% to 1,958.84, while NSE 20 and NSE 25 rose by 0.71% to 3,182.95 and 0.69% to 5084.52 respectively. The Banking Index recorded a gain of 0.64% to 203.18, reflecting sustained interest in select banking counters. Market capitalization increased 0.43% to Kes. 2,991.55Bn, while total equity turnover rose sharply by 121.16% to Kes. 669.22Mn.

Gainers/Losers: Sanlam Kenya led the gainers' list, climbing 6.75%, followed by Centum (+4.45%) and EABL (+3.23%). On the losing end, Williamson Tea dropped 8.06%, followed by NCBA Group (-5.93%) and Standard Group (-5.00%).

Top Movers: Safaricom continued to dominate market activity with a turnover of Kes. 228.61Mn, followed by Equity Group (Kes. 189.48Mn) and NCBA Group (Kes. 36.23Mn).

Foreign Participation: Foreign investors were net sellers, registering outflows in Safaricom (Kes. -217.50Mn), Equity Group (Kes. -90.31Mn), and BAT Kenya (Kes. -3.71Mn). Net inflows were recorded in KCB Group (Kes. 4.34Mn) and NSE (Kes. 1.71Mn).

Bonds Market: The secondary bonds market posted a reduced performance, with turnover declining by 43.14% to Kes. 6.84Bn from Kes. 12.03Bn in the previous session.

Market Update: I&M Holdings Plc reached a new all-time high of Kes. 45.05 on November 5, 2025, valuing the group at approximately Kes. 78.39Bn. The milestone reflects its strong fundamentals and consistent regional growth since its transformation from City Trust Limited in 2013. With operations spanning Kenya, Tanzania, Rwanda, Uganda, and Mauritius, the group's steady expansion and prudent management continue to attract investor confidence. Investor outlook remains positive, supported by solid earnings momentum and a sound regional diversification strategy.

Corporate Actions:

- **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
- **KPLC:** Final dividend Kes. 0.8/share; books closed 7-Oct-25; payment 30-Jan-26
- **KenGen:** Final dividend Kes. 0.90/share; books close 27-Nov-25; payment 12-Feb-26
- **Carbacid:** Final dividend Kes. 2.0/share; books close 26-Nov-25; payment 18-Dec-25

Market Activity Summary Tables

Market Indicators			
Indicator	Previous day	Current day	%Change
NASI	189.08	189.88	0.42%
NSE 10	1929.88	1958.84	1.50%
NSE 20	3160.49	3182.95	0.71%
NSE 25	5049.63	5084.52	0.69%
Bank Index	201.89	203.18	0.64%
Market Capitalization (Bn)	2978.87	2991.55	0.43%
Total Shares Traded (Mn)	14.35	24.70	72.13%
Total Equities Turnover (Mn)	302.59	669.22	121.16%
Bond Turnover (Bn)	12.03	6.84	-43.14%

Top Movers			
Stock	Share Price 4-Nov	Share Price 5-Nov	Mkt Turnover (Kes. Mn)
Safaricom	29.90	29.90	228.61
Equity Group	68.00	69.75	189.48
NCBA Group	88.50	83.25	36.23
KCB Group	62.00	63.25	33.61
Co-op Bank	21.65	21.80	26.86

Top Gainers			
Stock	Share Price 4-Nov	Share Price 5-Nov	%Change
Sanlam Kenya	8.30	8.86	6.75%
Centum	14.60	15.25	4.45%
EABL	232.00	239.50	3.23%
Unga Group	23.70	24.45	3.16%
Crown Paints Kenya	58.00	59.75	3.02%

Top Losers			
Stock	Share Price 4-Nov	Share Price 5-Nov	%Change
Williamson Tea Kenya	201.50	185.25	-8.06%
NCBA Group	88.50	83.25	-5.93%
Express Kenya	7.20	6.84	-5.00%
Kapchorua Tea	235.25	226.00	-3.93%
Total Energies Kenya	45.25	43.95	-2.87%

Top Foreign Buys		
Stock	Share Price 5-Nov	Foreign Buys (Kes. Mn)
Equity Group	69.75	38.61
KCB Group	63.25	14.06
NSE	19.40	1.71
Safaricom	29.90	0.79
Car & General (K)	56.25	0.15

Top Foreign Sells		
Stock	Share Price 5-Nov	Foreign Sells (Kes. Mn)
Safaricom	29.90	218.29
Equity Group	69.75	128.92
KCB Group	63.25	9.72
BAT Kenya	441.25	3.71
NCBA Group	83.25	3.08

Top Foreign Net Inflows		
Stock	Share Price 5-Nov	Net inflows (Kes. Mn)
KCB Group	63.25	4.34
NSE	19.40	1.71
Car & General (K)	56.25	0.15
Co-op Bank Group	21.80	0.13
Stan Chart Bank	311.00	0.10

Top Foreign Net Outflows		
Stock	Share Price 5-Nov	Net inflows (Kes. Mn)
Safaricom	29.90	29.90
Equity Group	68.00	69.75
NCBA Group	88.50	83.25
KCB Group	62.00	63.25
Co-op Bank Group	21.65	21.80

MARKET SUMMARY

Stock	Share Price 4-Nov	Share Price 5-Nov	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Dividend Yield
AGRICULTURAL						
Eaagads	20.35	20.50	0.74%	70.83%	0.02	-
Kakuzi Plc	411.00	411.00	0.00%	4.71%	0.00	1.95%
Kapchorua Tea	235.25	226.00	-3.93%	-5.54%	0.83	11.06%
Limuru Tea	385.00	385.00	0.00%	10.00%	0.00	-
Sasini Plc	18.70	18.90	1.07%	26.00%	0.34	5.29%
Williamson Tea Kenya	201.50	185.25	-8.06%	-17.58%	4.03	13.50%

AUTOMOBILES & ACCESSORIES

Car & General (K)	55.50	56.25	1.35%	125.00%	0.44	1.42%
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BANKING

ABSA Bank Kenya	23.35	23.80	1.93%	26.26%	14.26	7.35%
BK Group	42.45	42.80	0.82%	22.29%	0.24	6.12%
DTB Group	112.00	115.00	2.68%	72.28%	3.09	6.09%
Equity Group	68.00	69.75	2.57%	45.31%	189.48	6.09%
HF Group	10.90	10.95	0.46%	138.04%	2.73	-
I&M Group	45.00	45.05	0.11%	25.14%	10.93	6.66%
KCB Group	62.00	63.25	2.02%	49.17%	33.61	4.74%
NCBA Group	88.50	83.25	-5.93%	63.24%	36.23	6.61%
Stanbic Holdings	197.00	196.50	-0.25%	40.61%	2.63	10.55%
Stan Chart Bank	309.75	311.00	0.40%	9.03%	4.21	11.90%
Co-op Bank Group	21.65	21.80	0.69%	24.93%	26.86	6.88%

COMMERCIAL AND SERVICES

Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	-
Eveready East Africa	1.35	1.36	0.74%	16.24%	0.03	-
Express Kenya	7.20	6.84	-5.00%	90.00%	0.01	-
Homeboyz Entertainment Plc	4.66	4.66	0.00%	0.00%	0.00	-
Kenya Airways	3.83	3.83	0.00%	0.00%	1.31	-
Longhorn Publishers Plc	2.98	2.95	-1.01%	28.26%	0.00	-
Nairobi Business Ventures	1.54	1.55	0.65%	-22.89%	0.02	-
Nation Media Group	13.05	13.05	0.00%	-9.38%	0.22	-
Sameer Africa	15.00	14.95	-0.33%	512.70%	0.09	-
Standard Group	6.14	6.18	0.65%	23.85%	0.02	-
TPS Eastern Africa	16.20	16.45	1.54%	3.79%	0.04	2.13%
Uchumi Supermarket	0.37	0.38	2.70%	137.50%	0.04	-
WPP Scangroup	2.79	2.83	1.43%	12.75%	0.05	-

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	58.00	59.75	3.02%	76.25%	0.16	5.02%
E.A.Cables	1.71	1.71	0.00%	61.32%	0.00	-
E.A.Portland Cement	59.50	59.25	-0.42%	103.96%	0.07	1.69%

ENERGY & PETROLEUM

KenGen	10.50	10.50	0.00%	180.00%	16.64	8.57%
Kenya Power Ord.	14.30	14.00	-2.10%	170.27%	17.96	5.71%
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	45.25	43.95	-2.87%	115.97%	0.24	4.37%
Umeme Ltd	7.94	7.72	-2.77%	-53.77%	0.95	-

INSURANCE

Britam Plc	8.52	8.60	0.94%	47.77%	1.35	-
CIC Insurance	4.69	4.78	1.92%	123.36%	2.04	2.72%
Jubilee Holdings	320.00	319.75	-0.08%	82.98%	0.23	4.22%
Kenya Re	3.08	3.13	1.62%	131.85%	18.36	9.58%
Liberty Kenya	10.35	10.40	0.48%	55.22%	0.60	15.38%
Sanlam Kenya	8.30	8.86	6.75%	78.99%	0.04	-

INVESTMENT

Centum	14.60	15.25	4.45%	49.51%	1.14	2.10%
Home Afrika	1.13	1.16	2.65%	213.51%	0.22	-
Kurwitu Ventures	1500.00	1500.00	0.00%	0.00%	0.00	-
Olympia Capital Holdings	7.92	7.78	-1.77%	176.87%	0.01	-
Trans-Century	1.12	1.12	0.00%	180.00%	0.00	-

INVESTMENT SERVICES

NSE	19.30	19.40	0.52%	228.81%	5.07	-
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MANUFACTURING & ALLIED

BOC Kenya	129.00	129.00	0.00%	45.35%	0.00	6.71%
BAT Kenya	445.25	441.25	-0.90%	17.28%	25.90	11.33%
Carbacid Investments	30.75	30.25	-1.63%	48.65%	2.20	6.61%
EABL	232.00	239.50	3.23%	36.47%	15.34	3.34%
Flame Tree Group	1.84	1.85	0.54%	92.71%	0.32	-
Kenya Orchards	59.75	59.75	0.00%	-14.64%	0.00	-
Mumias Sugar Co.	0.27	0.27	0.00%	0.00%	0.00	-
Unga Group	23.70	24.45	3.16%	63.00%	0.01	-
Shri Krishna Overseas	8.18	8.18	0.00%	38.18%	0.00	-

TELECOMMUNICATION

Safaricom	29.90	29.90	0.00%	73.84%	228.61	4.01%
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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	4965.00	4935.00	-0.60%	55.19%	1.84	-
Satrix MSCI World F. ETF	841.00	822.00	-2.26%	8.02%	0.47	-

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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
Chrisanthus Lunani	clunani@co-opbank.co.ke	+254711049973

Sales Team

Alfred Too	atoo@co-opbank.co.ke	+254 711049538
Moffat Asena	amoffat@co-opbank.co.ke	+254 711049663
Gloria Ohito	gohito@co-opbank.co.ke	+254711049993
Dennis Langat	dlangat@co-opbank.co.ke	+254 711049592

Client Service and Operation

info@kingdomsecurities.co.ke