

Market Indicators: The equities market closed marginally lower today, with most major indices recording losses. NASI declined by 0.10% to 245.60, while NSE 10, NSE 25 and Banking indices shed 0.21%, 0.11% and 0.36% to close at 2,734.86, 6,977.73 and 288.88, respectively. In contrast, the NSE 20 gained 0.12% to 4,316.96. Consequently, market capitalization declined by 0.10% to Kes. 4.12Trn.

Trading Activity: Trading activity strengthened, with equity turnover increasing by 54.29% to Kes. 539.56Mn from Kes. 349.70Mn in the previous session. Volumes traded rose by 2.74% to 12.11Mn shares, while secondary market bond turnover declined by 34.19% to Kes. 16.21Bn.

Gainers/Losers: Olympia Capital was the day's top gainer, advancing by 5.63%, followed by Shri Krishna Overseas (+3.63%) and Sasini Plc (+3.02%). On the downside, Longhorn Publishers led the losers, declining by 6.01%, followed by Crown Paints Kenya (-3.29%) and Eaagads (-3.27%).

Top Movers: EABL dominated trading activity with a market turnover of Kes. 169.62Mn followed by Safaricom (Kes. 101.47Mn) and Equity Group (Kes. 100.19Mn).

Foreign Participation: Foreign investors turned net buyers, recording net inflows of Kes. 83.41Mn, compared with net outflows of Kes. 6.54Mn in the previous session. This was driven by a 172.84% increase in foreign purchases to Kes. 349.59Mn, alongside a 97.65% increase in foreign sales to Kes. 266.18Mn.

Safaricom recorded the largest foreign net inflow at Kes. 69.37Mn, followed by Equity Group (Kes. 28.15Mn) and Kenya Power (Kes. 6.66Mn). On the selling side, NSE registered the largest foreign net outflow at Kes. 21.81Mn, followed by KCB Group (Kes. 2.66Mn) and Centum (Kes. 0.87Mn).

Market Update: Umeme Limited reported a loss before tax of US\$ 21.87Bn for H1 2026, narrowing significantly from US\$ 154.84Bn in H1 2025, while loss per share improved to US\$ 13.5 from US\$ 102.7. Following the expiry of its electricity distribution concession in March 2025, the company generated negligible revenue during the period, with operations primarily focused on recovering the outstanding Buy-Out Amount and other claims from the Government of Uganda, alongside pursuing potential electricity distribution opportunities in other markets.

Corporate Actions:

Counter	Dividend Type	Dividend per Share	Book Closure	Payment Date
E.A Portland Cement	Final	1.25	31-Dec-25	30-Sep-26
EABL		8.70	19-Oct-2026	31-Oct-2026
Centum Investment		0.78	21-Oct-26	18-Dec-26
KenGen		0.75	29-Oct-26	21-Jan-27
Kenya Power		1.20	27-Nov-26	31-Dec-26
Stanbic	Interim	1.64	01-Sep-26	05-Oct-26
Absa		0.50	18-Sep-26	15-Oct-26
BOC Kenya		4.00	21-Sep-26	19-Oct-26
KCB		3.00	02-Sep-26	10-Nov-26
Jubilee Holdings		2.00	07-Sep-26	08-Oct-26

Market Activity Summary Tables

Market Indicators			
Indicator	Previous day	Current day	%Change
NASI	245.85	245.60	-0.10%
NSE 10	2740.61	2734.86	-0.21%
NSE 20	4312.00	4316.96	0.12%
NSE 25	6985.59	6977.73	-0.11%
Bank Index	289.91	288.88	-0.36%
Market Capitalization (Bn)	4125.87	4121.65	-0.10%
Shares Traded (Mn)	11.79	12.11	2.74%
Equities Turnover (Mn)	349.70	539.56	54.29%
Bond Turnover (Bn)	24.62	16.21	-34.19%
Foreign Buys	128.13	349.59	172.84%
Foreign Sales	134.67	266.18	97.65%
Net foreign flows	-6.54	83.41	-1375.38%

Top Movers	Share Price		
Stock	29-Sep-26	30-Sep-26	Mkt Turnover (Kes. Mn)
EABL	286.75	290.00	169.62
Safaricom	35.95	35.90	101.47
Equity Group	105.00	104.75	100.19
KCB Group	92.50	91.25	31.01
NSE	30.85	30.35	24.87
Co-op Bank	37.15	37.10	18.81

Top Gainers	Share Price		
Stock	29-Sep-26	30-Sep-26	%Change
Olympia Capital	7.46	7.88	5.63%
Shri Krishna Overseas	16.55	17.15	3.63%
Sasini Plc	23.20	23.90	3.02%
Nation Media Group	14.65	15.05	2.73%
Kapchorua Tea	339.75	349.00	2.72%

Top Losers	Price		
Stock	29-Sep-26	30-Sep-26	%Change
Longhorn Publishers Plc	2.83	2.66	-6.01%
Crown Paints Kenya	60.75	58.75	-3.29%
Eaagads	29.05	28.10	-3.27%
Standard Group	6.32	6.14	-2.85%
Home Afrika	1.10	1.07	-2.73%

Top Foreign Buys

Stock	30-Sep-26	Foreign Buys (Kes. Mn)
EABL	290.00	163.70
Safaricom	35.90	93.34
Equity Group	104.75	80.34
Kenya Power	23.10	6.66
KCB Group	91.25	4.60

Top Foreign Sells

Stock	30-Sep-26	Foreign Sells (Kes. Mn)
EABL	290.00	159.49
Equity Group	104.75	52.19
Safaricom	35.90	23.97
NSE	30.35	21.96
KCB Group	91.25	7.25

Top Foreign Net Inflows (Kes. Mn)

Stock	30-Sep-26	Net inflows
Safaricom	35.90	69.37
Equity Group	104.75	28.15
Kenya Power	23.10	6.66
EABL	290.00	4.21
KenGen	10.70	0.21

Top Foreign Net Outflows (Kes. Mn)

Stock	30-Sep-26	Net Outflows
NSE	30.35	-21.81
KCB Group	91.25	-2.66
Centum	18.20	-0.87
Absa NewGold ETF	5090.00	-0.17
Kenya Pipeline Co.	9.00	-0.01

MARKET SUMMARY

Stock	29-Sep-26	30-Sep-26	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Annual Dividend Yield	Trailing Dividend Yield
AGRICULTURAL							
Eaagads	29.05	28.10	-3.27%	37.07%	0.21	0.00%	0.00%
Kakuzi Plc	438.50	438.50	0.00%	9.08%	3.29	3.65%	3.65%
Kapchorua Tea	339.75	349.00	2.72%	50.76%	0.16	8.60%	0.00%
Limuru Tea	510.00	510.00	0.00%	10.87%	0.01	0.00%	0.00%
Sasini Plc	23.20	23.90	3.02%	33.89%	0.09	0.00%	0.00%
Williamson Tea Kenya	160.25	156.75	-2.18%	4.85%	1.10	9.57%	0.00%
AUTOMOBILES & ACCESSORIES							
Car & General (K)	286.25	292.75	2.27%	474.02%	1.94	1.17%	1.07%
BANKING							
ABSA Bank Kenya	33.05	33.15	0.30%	34.21%	9.14	6.18%	5.58%
BK Group	58.75	59.75	1.70%	40.59%	0.57	7.92%	7.86%
DTB Group	188.50	189.00	0.27%	65.07%	9.27	4.76%	4.76%
Equity Group	105.00	104.75	-0.24%	56.93%	100.19	5.49%	5.49%
Family Bank	29.30	28.95	-1.19%	60.83%	3.26	4.15%	0.00%
HF Group	12.10	12.20	0.83%	22.49%	0.57	0.00%	0.00%
I&M Group	83.75	82.50	-1.49%	94.35%	4.65	4.55%	4.55%
KCB Group	92.50	91.25	-1.35%	38.78%	31.01	7.67%	3.29%
NCBA Group	88.75	89.00	0.28%	5.95%	1.30	7.98%	5.17%
Stanbic Holdings	281.00	282.00	0.36%	42.60%	0.74	7.93%	6.58%
Stan Chart Bank	317.25	317.25	0.00%	6.73%	13.57	9.77%	7.25%
Co-op Bank Group	37.15	37.10	-0.13%	54.91%	18.81	6.74%	4.04%
COMMERCIAL AND SERVICES							
Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	0.00%	0.00%
Eveready East Africa	1.00	1.01	1.00%	-26.28%	0.04	0.00%	0.00%
Express Kenya	7.78	7.66	-1.54%	3.51%	0.02	0.00%	0.00%
Homeboyz Ent.	4.66	4.66	0.00%	0.00%	0.00	0.00%	0.00%
Kenya Airways	5.70	5.72	0.35%	62.04%	0.86	0.00%	0.00%
Longhorn Publishers	2.83	2.66	-6.01%	-8.28%	0.05	0.00%	0.00%
Nairobi Business V.	1.28	1.30	1.56%	-11.56%	0.06	0.00%	0.00%
Nation Media Group	14.65	15.05	2.73%	30.30%	0.57	0.00%	0.00%
Sameer Africa	17.50	17.10	-2.29%	20.00%	0.09	0.00%	0.00%
Standard Group	6.32	6.14	-2.85%	1.66%	0.01	0.00%	0.00%
TPS Eastern Africa	17.05	17.05	0.00%	15.99%	0.02	2.05%	0.00%
Uchumi Supermarket	1.50	1.47	-2.00%	42.72%	0.31	0.00%	0.00%
WPP Scangroup	2.10	2.10	0.00%	-17.65%	0.06	0.00%	0.00%
CONSTRUCTION & ALLIED							
Athi River Mining	5.55	5.55	0.00%	0.00%	0.00	0.00%	0.00%
Bamburi Cement	54.00	54.00	0.00%	0.00%	0.00	0.00%	0.00%
Crown Paints Kenya	60.75	58.75	-3.29%	7.80%	0.05	5.11%	5.11%
E.A.Cables	1.71	1.71	0.00%	0.00%	0.00	0.00%	0.00%

E.A.Portland Cement	118.50	120.00	1.27%	63.27%	0.50	0.00%	0.00%
ENERGY & PETROLEUM							
KenGen	10.70	10.70	0.00%	16.56%	10.98	7.01%	7.01%
Kenya Pipeline Co.	9.00	9.00	0.00%	-1.10%	2.31	0.00%	0.00%
Kenya Power Ord.	23.00	23.10	0.43%	69.85%	12.39	6.49%	6.49%
Kenya Power Pref 4	5.26	5.26	0.00%	5.20%	0.00	0.00%	0.00%
Kenya Power Pref 7	6.00	6.00	0.00%	0.00%	0.00	0.00%	0.00%
Total Energies Kenya	47.55	46.90	-1.37%	21.66%	0.24	7.36%	0.00%
Umeme Ltd	6.12	6.04	-1.31%	-22.76%	0.46	0.00%	0.00%
INSURANCE							
Britam Plc	18.55	18.80	1.35%	106.59%	0.69	0.00%	0.00%
CIC Insurance	5.00	4.95	-1.00%	8.32%	7.08	0.00%	2.63%
Jubilee Holdings	398.50	400.00	0.38%	19.40%	0.24	0.50%	0.50%
Kenya Re	4.42	4.41	-0.23%	46.51%	4.46	3.40%	3.40%
Liberty Kenya	9.48	9.36	-1.27%	-7.33%	0.01	5.34%	5.34%
Sanlam Kenya	10.00	10.10	1.00%	19.39%	0.20	0.00%	0.00%
INVESTMENT							
Centum	18.05	18.20	0.83%	31.41%	1.56	4.29%	0.00%
Home Afrika	1.10	1.07	-2.73%	-20.15%	0.35	0.00%	0.00%
Kurwitu Ventures	1355.00	1355.00	0.00%	-9.67%	0.00	0.00%	0.00%
Olympia Capital	7.46	7.88	5.63%	-4.14%	0.04	0.00%	0.00%
Trans-Century	1.12	1.12	0.00%	0.00%	0.00	0.00%	0.00%
INVESTMENT SERVICES							
NSE	30.85	30.35	-1.62%	49.88%	24.87	3.29%	0.00%
MANUFACTURING & ALLIED							
BOC Kenya	182.00	179.25	-1.51%	41.14%	0.35	7.17%	0.00%
BAT Kenya	562.00	559.00	-0.53%	21.79%	2.08	12.52%	10.73%
Carbacid Investments	43.10	42.40	-1.62%	44.46%	0.33	4.72%	0.00%
EABL	286.75	290.00	1.13%	10.27%	169.62	1.38%	1.38%
Flame Tree Group	2.10	2.14	1.90%	36.31%	0.12	0.00%	0.00%
Africa Mega Agricorp	345.50	354.25	2.53%	402.48%	0.28	0.00%	0.00%
Mumias Sugar Co.	0.27	0.27	0.00%	0.00%	0.00	0.00%	0.00%
Unga Group	40.05	40.40	0.87%	74.14%	0.11	0.00%	0.00%
Shri Krishna Overseas	16.55	17.15	3.63%	110.17%	0.13	0.00%	0.00%
TELECOMMUNICATION							
Safaricom	35.95	35.90	-0.14%	26.63%	101.47	5.57%	2.37%
REITs							
LapTrust Imara I-REIT	20.00	20.00	0.00%	0.00%	0.00	3.00%	2.05%
ALP Industrial REIT	1.02	1.02	0.00%	0.00%	0.00	0.00%	0.00%
TRIFIC USD I-REIT	1.23	1.23	0.00%	0.00%	0.00	0.00%	0.00%
EXCHANGE TRADED FUNDS							
Absa NewGold ETF	5090.00	5090.00	0.00%	-5.65%	0.44	0.00%	0.00%
Satrix MSCI World F.	968.00	965.00	-0.31%	10.79%	0.10	0.00%	0.00%

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