

Market Indicators: The equities market closed on a negative note, with all major indices recording losses. NASI, NSE 10, NSE 20, NSE 25, and the banking index declined by 0.61%, 0.67%, 1.18%, 0.42%, and 0.26% to 253.73, 2809.67, 4451.17, 7175.06, and 298.82, respectively. Consequently, market capitalization declined by 0.61% to Kes. 4.26Trn.

Trading Activity: Trading activity softened, with equity turnover reducing by 22.11% to Kes. 1.03Bn from Kes. 1.32Bn in the previous session. Traded volumes also decreased by 6.02% to 32.31Mn shares. In contrast, secondary bond market turnover increased by 51.47% to Kes. 8.21Bn.

Gainers/Losers: Car & General (K) emerged as the day's top gainer after rallying 7.32%, followed by Eaagads (+6.65%) and Africa Mega Agricorp (+6.23%). On the downside, KenGen led the losers after shedding 11.95%, followed by Longhorn (-6.69%) and KenyaRe (-6.42%).

Top Movers: Equity was the most actively traded counter, posting a market turnover of Kes. 317.44Mn, followed by DTB Group (Kes. 155.45Mn) and HFCB (Kes. 129.92Mn).

Foreign Participation: Foreign investors were net sellers, with a net outflow position of Kes. 104.20Mn from a net inflow position of Kes. 73.23Mn in the previous session. This was driven by a 28.91% decline in foreign purchases to Kes. 282.60Mn, alongside a 19.25% increase in foreign sales to Kes. 386.80Mn. Equity Group recorded the largest foreign net inflows at Kes. 66.70Mn, followed by Centum (Kes. 3.60Mn) and Jubilee Holdings (Kes. 2.80Mn). On the selling side, DTB Group posted the largest foreign net outflows at Kes. 137.02Mn, followed by Safaricom (Kes. 22.16Mn) and KCB Group (Kes. 17.84Mn).

Market Update: KenGen released its financial results for the year ending 30th June 2026 reporting a 6.4% YoY increase in revenue to Kes. 59.71Bn, while PBT declined 2.7% to Kes. 15.05Bn, reflecting higher operating and finance costs. EPS declined 1.3% to Kes. 1.57, from Kes. 1.59, while DPS fell 16.7% YoY to Kes. 0.75, from Kes. 0.90. Despite the softer profitability, the company continues to advance a diversified renewable-energy pipeline across geothermal, hydro, wind and solar, supporting its long-term growth outlook.

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
Kapchorua Tea		30.00	31-Jul-26	Pending Approval
Williamson Tea		15.00	31-Jul-26	
Centum Investment		0.78	Pending Approval	
KenGen		0.75	29-Oct-26	21-Jan-27

NCBA	Interim	3.75	28-Aug-26	08-Sep-26
BAT		10.00	28-Aug-26	25-Sep-26
Stanbic		1.64	01-Sep-26	05-Oct-26
Car & General		1.00	03-Sep-26	10-Sep-26
SCBK		8.50	10-Sep-26	24-Sep-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	255.30	253.73	-0.61%
NSE 10	2828.56	2809.67	-0.67%
NSE 20	4504.49	4451.17	-1.18%
NSE 25	7205.44	7175.06	-0.42%
Bank Index	299.61	298.82	-0.26%
Market Capitalization (Bn)	4284.38	4258.07	-0.61%
Shares Traded (Mn)	34.38	32.31	-6.02%
Equities Turnover (Mn)	1316.13	1025.17	-22.11%
Bond Turnover (Bn)	5.42	8.21	51.47%
Foreign Buys	397.60	282.60	-28.92%
Foreign Sales	324.37	386.80	19.25%
Net foreign flows	73.23	-104.20	-242.29%

Top Movers	Share Price		
Stock	04-Sep-26	07-Sep-26	Mkt Turnover (Kes. Mn)
Equity Group	106.00	105.50	327.44
DTB Group	192.50	192.00	155.45
HF Group	13.00	13.00	129.92
Safaricom	37.65	37.40	97.08
I&M Group	81.75	82.00	43.63
KenGen	12.55	11.05	40.46

Top Gainers	Share Price		
Stock	04-Sep-26	07-Sep-26	%Change
Car & General (K)	283.50	304.25	7.32%
Eaagads	27.80	29.65	6.65%
Africa Mega Agricorp	216.75	230.25	6.23%
Britam Plc	20.40	21.35	4.66%
TPS Eastern Africa	18.00	18.75	4.17%

Top Losers	Price		
Stock	04-Sep-26	07-Sep-26	%Change
KenGen	12.55	11.05	-11.95%
Longhorn	2.99	2.79	-6.69%
Kenya Re	4.83	4.52	-6.42%
Home Afrika	1.16	1.10	-5.17%
Unga Group	45.50	43.20	-5.05%

Top Foreign Buys

Stock	04-Sep-26	Foreign Buys (Kes. Mn)
Equity Group	105.50	252.24
Safaricom	37.40	19.76
Jubilee Holdings	416.50	5.36
Centum	18.05	3.60
Family Bank	30.25	0.78

Top Foreign Sells

Stock	04-Sep-26	Foreign Sells (Kes. Mn)
Equity Group	105.50	185.54
DTB Group	192.00	137.02
Safaricom	37.40	41.92
KCB Group	98.50	17.85
Jubilee Holdings	416.50	2.56

Top Foreign Net Inflows (Kes. Mn)

Stock	04-Sep-26	Net inflows
Equity Group	105.50	66.70
Centum	18.05	3.60
Jubilee Holdings	416.50	2.80
Family Bank	30.25	0.78
Williamson Tea Kenya	156.25	0.47

Top Foreign Net Outflows (Kes. Mn)

Stock	04-Sep-26	Net Outflows
DTB Group	192.00	-137.02
Safaricom	37.40	-22.16
KCB Group	98.50	-17.84
Satrix MSCI World F.	990.00	-1.09
Kenya Re	4.52	-0.45

MARKET SUMMARY

Stock	4-Sep-26	7-Sep-26	%Change	YTD %Change	Mkt Turnover (Kes. Mn)	Annual Dividend Yield	Trailing Dividend Yield
AGRICULTURAL							
Eaagads	27.80	29.65	6.65%	44.63%	0.38	0.00%	0.00%
Kakuzi Plc	429.75	431.75	0.47%	7.40%	5.58	3.71%	3.71%
Kapchorua Tea	335.00	334.25	-0.22%	44.38%	0.43	8.98%	0.00%
Limuru Tea	525.00	525.00	0.00%	14.13%	0.02	0.00%	0.00%
Sasini Plc	25.05	24.85	-0.80%	39.22%	0.22	0.00%	0.00%
Williamson Tea Kenya	156.25	156.25	0.00%	4.52%	1.88	9.60%	0.00%
AUTOMOBILES & ACCESSORIES							
Car & General (K)	283.50	304.25	7.32%	496.57%	4.38	1.12%	1.03%
BANKING							
ABSA Bank Kenya	34.95	34.85	-0.29%	41.09%	6.67	5.88%	5.31%
BK Group	65.00	65.25	0.38%	53.53%	0.43	7.25%	7.19%
DTB Group	192.50	192.00	-0.26%	67.69%	155.45	4.69%	4.69%
Equity Group	106.00	105.50	-0.47%	58.05%	327.44	5.45%	5.45%
Family Bank	30.40	30.25	-0.49%	68.06%	27.43	3.97%	0.00%
HF Group	13.00	13.00	0.00%	30.52%	129.92	0.00%	0.00%
I&M Group	81.75	82.00	0.31%	93.17%	43.63	4.57%	4.57%
KCB Group	98.00	98.50	0.51%	49.81%	37.98	7.11%	3.05%
NCBA Group	92.50	92.25	-0.27%	9.82%	6.45	7.70%	4.99%
Stanbic Holdings	279.00	279.50	0.18%	41.34%	1.13	8.00%	6.64%
Stan Chart Bank	349.25	345.50	-1.07%	16.23%	5.35	8.97%	6.66%

Co-op Bank Group	38.55	38.15	-1.04%	59.29%	37.28	6.55%	3.93%
COMMERCIAL AND SERVICES							
Deacons East Africa	0.45	0.45	0.00%	0.00%	0.00	0.00%	0.00%
Eveready East Africa	1.01	1.02	0.99%	-25.55%	0.17	0.00%	0.00%
Express Kenya	7.28	6.98	-4.12%	-5.68%	0.05	0.00%	0.00%
Homeboyz Ent.	4.66	4.66	0.00%	0.00%	0.00	0.00%	0.00%
Kenya Airways	5.72	5.70	-0.35%	61.47%	5.68	0.00%	0.00%
Longhorn Publishers	2.99	2.79	-6.69%	-3.79%	0.03	0.00%	0.00%
Nairobi Business V.	1.35	1.34	-0.74%	-8.84%	0.02	0.00%	0.00%
Nation Media Group	17.25	17.10	-0.87%	48.05%	1.06	0.00%	0.00%
Sameer Africa	18.90	19.15	1.32%	34.39%	0.42	0.00%	0.00%
Standard Group	6.10	6.14	0.66%	1.66%	0.01	0.00%	0.00%
TPS Eastern Africa	18.00	18.75	4.17%	27.55%	0.34	1.87%	0.00%
Uchumi Supermarket	1.45	1.45	0.00%	40.78%	0.16	0.00%	0.00%
WPP Scangroup	2.06	2.03	-1.46%	-20.39%	0.14	0.00%	0.00%
CONSTRUCTION							
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	63.75	63.25	-0.78%	16.06%	0.03	0.00%	0.00%
E.A.Cables	1.71	1.71	0.00%	0.00%	0.00	0.00%	0.00%
E.A.Portland Cement	118.75	122.25	2.95%	66.33%	0.07	0.00%	0.00%
ENERGY & PETROLEUM							
KenGen	12.55	11.05	-11.95%	20.37%	40.46	75.00%	6.79%
Kenya Pipeline Co.	9.00	9.00	0.00%	-1.10%	3.40	0.00%	0.00%
Kenya Power Ord.	24.00	23.50	-2.08%	72.79%	25.71	1.28%	4.68%
Kenya Power Pref 4	5.00	5.00	0.00%	0.00%	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	49.80	50.25	0.90%	30.35%	3.56	6.87%	0.00%
Umeme Ltd	6.34	6.40	0.95%	-18.16%	0.53	0.00%	0.00%
INSURANCE							
Britam Plc	20.40	21.35	4.66%	134.62%	11.62	0.00%	0.00%
CIC Insurance	4.71	4.66	-1.06%	1.97%	0.61	0.00%	2.79%
Jubilee Holdings	415.00	416.50	0.36%	24.33%	5.93	0.48%	0.00%
Kenya Re	4.83	4.52	-6.42%	50.17%	19.52	3.32%	0.00%
Liberty Kenya	9.26	9.22	-0.43%	-8.71%	0.07	5.42%	0.00%
Sanlam Kenya	10.65	10.25	-3.76%	21.16%	0.10	0.00%	0.00%
INVESTMENT							
Centum	18.40	18.05	-1.90%	30.32%	5.53	4.32%	0.00%
Home Afrika	1.16	1.10	-5.17%	-17.91%	0.22	0.00%	0.00%
Kurwitu Ventures	1355.00	1355.00	0.00%	-9.67%	0.01	0.00%	0.00%
Olympia Capital	8.46	8.40	-0.71%	2.19%	0.03	0.00%	0.00%
Trans-Century	1.12	1.12	0.00%	0.00%	0.00		0.00%

INVESTMENT SERVICES

NSE	29.25	28.70	-1.88%	41.73%	4.53	3.48%	0.00%
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MANUFACTURING

BOC Kenya	192.75	193.25	0.26%	52.17%	0.52	6.65%	0.00%
BAT Kenya	567.00	568.00	0.18%	23.75%	3.42	12.32%	10.56%
Carbacid Investments	42.35	42.80	1.06%	45.83%	1.55	4.67%	0.00%
EABL	290.50	286.50	-1.38%	8.94%	3.03	1.40%	1.40%
Flame Tree Group	2.10	2.06	-1.90%	31.21%	0.17	0.00%	0.00%
Africa Mega Agricorp	216.75	230.25	6.23%	226.60%	0.32	0.00%	0.00%
Mumias Sugar Co.	0.27	0.27	0.00%	0.00%	0.00	0.00%	0.00%
Unga Group	45.50	43.20	-5.05%	86.21%	1.77	0.00%	0.00%
Shri Krishna Overseas	18.40	17.65	-4.08%	116.30%	0.35	0.00%	0.00%

TELECOMMUNICATION

Safaricom	37.65	37.40	-0.66%	31.92%	97.08	5.35%	2.27%
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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%	-99.21%	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	5370.00	5370.00	0.00%	-0.46%	0.37	0.00%	0.00%
Satrix MSCI World F.	999.00	990.00	-0.90%	13.66%	1.29	0.00%	0.00%

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