



Daily Market Report 14th August, 2020.

Top Gainers

Company	(%)	Vol.
NMG	6.85%	107,400
SMER	6.38%	700
HFCK	4.99%	100
BRIT	4.37%	200
CTUM	3.67%	2,400

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
EVRD	-7.48%	6,500
NBV	-6.67%	10,900
UCHM	-6.45%	59,000
KNRE	-4.74%	3,923,400
SCAN	-3.99%	92,200

(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
SCOM	5,272,400
KNRE	3,923,400
KCB	2,324,600
EQTY	2,035,500
KPLC	795,500

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

	Today	Previous	% A
USD/KES	108.29	108.39	0.09%
EUR/KES	128.18	127.57	-0.472%
GBP/KES	141.24	141.24	0.00%
JPY(100)/KES	101.31	101.36	0.04%
YUAN/KES	15.59	15.61	0.13%
RUPEE/KES	1.45	1.45	0.10%
KES/UGS	33.94	33.90	-0.09%
KES/TZS	21.47	21.45	-0.09%
RAND/KES	6.22	6.24	0.29%

(Source: NSE, AIB-AXYS)

Dear client,

Below are today highlights:

CURRENCY:

The shilling appreciated against the greenback to trade at **KES108.29/\$** in contrast to the **KES 108.39/\$** during the previous session. The shilling has remained under pressure since the mid-March, when the country reported its first case of COVID-19. Foreign investor outflows have increased and CBK has used its forex reserves in a bid to support the shilling. As at August 6th, CBK's usable foreign exchange reserves stood at **USD 9,290 million (5.64months of import cover)**.

MONEY MARKET:

The interbank rate decreased to **1.76%** from **1.96%**.

EQUITIES:

Equity turnover at the NSE decreased by **78.13%** to **KES 0.35Bn** from **KES 0.20Bn** recorded in the previous session. The top traders today were Safaricom, KCB and Equity. The counters' turnover stood at **KES 146Mn**, **KES 71Mn** and **KES59Mn** respectively. Foreign investors were net-sellers recording net inflows of **KES 0.13Bn** as compared to net inflows of **KES 0.044Bn** in the previous session. In terms of company specific foreign activity, foreigners were net-sellers on Equity and KCB and Safaricom.

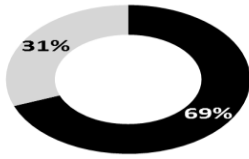
SUMMARY OF MARKET STATISTICS:

KES	Today	Previous	%	Trend	YTD
Equity Turnover	353,010,091	198,178,331	78.13	↑	16.20
Total Volume Traded	18,497,714	8,043,400	129.97	↑	73.35
Market Cap (Bn KES)	1,987.21	1,990.89	(0.18)	↓	(21.76)
Bond Turnover (Bn KES)	3.41	2.81	21.61	↑	6,950.37
NSE 20 Share Index	1,743.58	1,738.58	0.29	↑	(34.31)
NSE All Share Index	129.46	129.70	(0.19)	↓	(22.20)
FTSE NSE KENYA 15 Index	153.88	153.85	0.02	↑	(30.47)
FTSE NSE Kenya 25 Index	170.23	168.01	1.32	↑	(25.82)
FTSE NSE KENYA Gov't bond index	97.73	97.66	0.07	↑	0.24
Foreign buys (KES)	178,743,425	107,015,295	67.03	↑	(27.28)
Foreign Sales (KES)	309,708,916	151,254,512	104.76	↑	307.03

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



■ Foreign Investors ■ Local Investors

(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
SCOM	116,252,075
EQTY	32,623,050
EABL	28,428,400
BAT	1,148,000
KCB	184,190

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
SCOM	120,903,685
KCB	68,047,720
EQTY	56,741,600
EABL	32,894,400
BAT	16,892,000

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Top Traders (Ksh)	
SCOM	146,135,115
KCB	70,958,715
EQTY	58,559,995
EABL	33,125,600
BAT	17,449,900
KNRE	8,653,234
BKG	3,829,100
KEGN	2,717,870
ABSA	1,811,128
KPLC	1,490,111
NCBA	1,405,480
NMG	1,258,265
COOP	982,525
SCAN	709,884
CIC	707,390

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	14 -Aug-20	13 -Aug-20	12 -Aug-20	11 -Aug-20
NSE 20	1743.58	1738.58	1751.39	1733.14
NASI	129.46	129.70	130.76	129.24
Market Cap (KES Bn)	1987.21	1990.89	2007.23	1983.85
Equity + I Reit turnover (KES Bn)	0.35	0.20	0.27	0.36
Bond Turnover (KES Bn)	3.41	2.81	2.07	3.20

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET:

Secondary bond market turnover was up, increasing by **21.61%** to **KES3.41Bn** from **KES2.81Bn** worth of bonds traded previously. The number of deals increased to **105** from **66** in the previous session. The **FXD1/2019/5Yr** was today's most traded bond.

DAY'S FEATURE: Stanbic Holdings un-audited results for the year ending 30th June.

Income Statement	1H19	1H20	AIB-AXYS	% y/y	Deviation
	KES M	KES M	Estimates		
Net interest income	6,702	6,304	7,581	-5.9%	-16.8%
Non interest revenue	6,135	4,960	6,350	-19.1%	-21.9%
Total Income	12,837	11,264	13,930	-12.3%	-19.1%
Credit impairment charges	1,235	1,982	1,978	60.5%	0.2%
Income after impairment charges	11,603	9,282	11,952	-20.0%	-22.3%
Total operating expenses	6,042	5,151	7,321	-14.7%	-29.6%
Profit before taxation	5,561	4,131	4,631	-25.7%	-10.8%
Income tax expense	1,498	1,578	1,158	5.3%	36.3%
Profit for the period	4,063	2,553	3,474	-37.2%	-26.5%

Our view: The Group's 1H20 performance was largely in line with our expectations; we remain concerned that the surge in NPLs that is expected to see provisions eat into the bottom line going forward. [Click here](#)

The table below shows summary of trading activity at the Nairobi Stock Exchange at the end of day.

Security ID	Net Change	Per Change	Closing Price	Prev Closing Price	Total Turnover	Total Volume	Foreign Buys	Foreign Sales
NMG	0.75	6.85%	11.70	10.95	1,258,265	107,400	11,950	-
SMER	0.21	6.38%	3.50	3.29	2,450	700	-	-
HFCK	0.19	4.99%	4.00	3.81	400	100	-	-
BRIT	0.30	4.37%	7.16	6.86	1,430	200	-	-
CTUM	0.80	3.67%	22.60	21.80	54,210	2,400	-	-
LKL	0.17	3.59%	4.90	4.73	980	200	-	-
FTGH	0.04	2.88%	1.43	1.39	572	400	-	-
COOP	0.25	2.36%	10.85	10.60	982,525	90,500	-	291,500
EQTY	0.65	2.31%	28.75	28.10	58,559,995	2,035,500	32,623,050	56,741,600
HAFR	0.01	2.27%	0.45	0.44	14,337	32,200	-	-
CARB	0.14	1.75%	8.16	8.02	324,824	39,800	-	-
NSE	0.08	1.19%	6.78	6.70	63,048	9,300	-	-
BAT	2.75	0.85%	328.00	325.25	17,449,900	53,200	1,148,000	16,892,000
UMME	0.04	0.54%	7.40	7.36	8,880	1,200	-	-
CGEN	0.05	0.24%	21.05	21.00	4,210	200	-	-
ABSA	-	0.00%	9.06	9.06	1,811,128	199,900	-	514,630
DTK	-	0.00%	67.25	67.25	114,475	1,700	60,750	-
ARM	-	0.00%	5.55	5.55	-	-	-	-
BOC	-	0.00%	57.75	57.75	-	-	-	-
CIC	-	0.00%	2.00	2.00	707,390	353,700	-	-
CRVWV	-	0.00%	46.50	46.50	23,250	500	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
EABL	-	0.00%	154.00	154.00	33,125,600	215,100	28,428,400	32,894,400
GLD	-	0.00%	1,970.00	1,970.00	-	-	-	-
JUB	-	0.00%	220.50	220.50	-	-	-	-
KAPC	-	0.00%	80.00	80.00	-	-	-	-
KCB	-	0.00%	30.55	30.55	70,958,715	2,324,600	184,190	68,047,720
KQ	-	0.00%	3.83	3.83	-	-	-	-
KUKZ	-	0.00%	391.00	391.00	-	-	-	-
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LIMIT	-	0.00%	385.00	385.00	-	-	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
NBK	-	0.00%	4.12	4.12	-	-	-	-
OCH	-	0.00%	2.45	2.45	-	-	-	-
ORCH	-	0.00%	12.25	12.25	-	-	-	-
PORT	-	0.00%	13.85	13.85	-	-	-	-
SASN	-	0.00%	17.00	17.00	34,000	2,000	-	-
SBIC	-	0.00%	73.50	73.50	-	-	-	-
SGL	-	0.00%	22.50	22.50	-	-	-	-
SLAM	-	0.00%	13.50	13.50	-	-	-	-
TCL	-	0.00%	1.80	1.80	52,200	29,000	-	-
UNGA	-	0.00%	32.70	32.70	-	-	-	-
WTK	-	0.00%	144.00	144.00	532,400	3,700	-	187,200
FAHR	(0.02)	-0.37%	5.42	5.44	617,952	113,900	-	-
TOTL	(0.10)	-0.43%	22.90	23.00	121,480	5,300	-	-
SCBK	(0.75)	-0.49%	151.00	151.75	347,150	2,300	-	-
SCOM	(0.15)	-0.54%	27.70	27.85	146,135,115	5,272,400	116,252,075	120,903,685
CABL	(0.01)	-0.61%	1.63	1.64	19,883	12,200	-	-
BAMB	(0.20)	-0.76%	26.05	26.25	325,610	12,500	-	-
TPSE	(0.15)	-1.04%	14.25	14.40	61,355	4,300	34,440	-
KPLC	(0.02)	-1.06%	1.87	1.89	1,490,111	795,500	-	432,024
LBTY	(0.08)	-1.10%	7.22	7.30	23,840	3,300	-	-
EGAD	(0.15)	-1.43%	10.35	10.50	4,140	400	-	-
NCBA	(0.35)	-1.51%	22.80	23.15	1,405,480	61,700	-	-
KEGN	(0.12)	-2.08%	5.64	5.76	2,717,870	482,600	570	293,280
IMH	(1.00)	-2.19%	44.65	45.65	339,170	7,600	-	-
XPRS	(0.10)	-2.56%	3.80	3.90	59,315	15,600	-	-
BKG	(0.50)	-3.03%	16.00	16.50	3,829,100	239,300	-	3,829,100
SCAN	(0.32)	-3.99%	7.70	8.02	709,884	92,200	-	384,908
KNRE	(0.11)	-4.74%	2.21	2.32	8,653,234	3,923,400	-	8,296,673
UCHM	(0.02)	-6.45%	0.29	0.31	17,214	59,000	-	-
NBV	(0.04)	-6.67%	0.56	0.60	6,115	10,900	-	-
EVRD	(0.08)	-7.48%	0.99	1.07	6,451	6,500	-	196

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