Daily Market Report 17th August 2022

Top Gainers

Company	(%)	Vol.
LBTY	9.77%	200
SCAN	6.34%	6,900
CABL	5.88%	35,500
CTUM	3.98%	18,400
SMER	3.91%	200

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
KAPC	-9.45%	100
TOTL	-9.09%	3,000
BKG	-6.96%	1,700
LKL	-4.86%	82,900
WTK	-2.60%	5,000

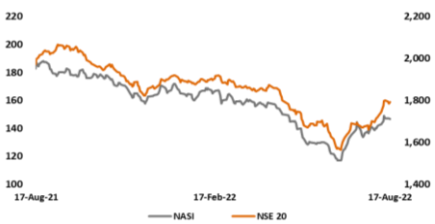
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
SCOM	7,573,100
KPLC	793,100
KEGN	576,400
ABSA	139,900
KCB	123,200

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

Currency	Today	Previous	% Δ
USD/KES	119.45	119.41	-0.03%
EUR/KES	121.35	122.05	0.57%
GBP/KES	144.01	144.51	0.34%
JPY(100)/KES	89.03	89.97	1.06%
YUAN/KES	17.63	17.64	0.02%
RUPEE/KES	1.51	1.50	-0.23%
KES/UGS	31.48	31.46	-0.04%
KES/TZS	19.52	19.53	0.03%
RAND/KES	7.28	7.28	-0.03%

(Source: NSE, AIB-AXYS)

Dear client,

The following are today's highlights:

EQUITIES

The benchmark indices recorded mixed trends with the NASI down **0.27%** and NSE 20 up **0.43%** to close at **KES 146.81** and **KES 1,792.92** respectively. The movement took the YTD performance for the **NASI** and **NSE 20** to **(11.80%)** and **(5.76%)** respectively.

Equities market turnover at the NSE increased by **39.92%** to **KES 272.53Mn** from **KES 194.78Mn** recorded in the previous session. The top traders were **SCOM, EABL** and **KCB**. The counters' turnover stood at **KES 235Mn, KES 8Mn and KES 5Mn**, respectively. The largest stock gainers were **LBTY** with an increase of **9.77%** while the largest loser was **KAPC** with a decrease of **9.45%.**

Foreign investors were net buyers recording net inflows of **KES 6Mn** as compared to net inflows of **KES 26Mn** in the previous session. In terms of company-specific foreign activity, **EABL** was a net seller while **SCOM** and **KCB** were neutral.

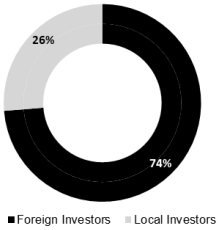
SUMMARY OF MARKET STATISTICS

	Today	Previous	%	Trend	YTD
Equity Turnover	272,534,224	194,776,048	39.92	↑	(20.94)
Total Volume Traded	10,228,800	7,456,600	37.18	↑	0.41
Market Cap (Bn)	2,288.20	2,294.44	(0.27)	↓	(11.75)
Bond Turnover (Bn)	1.50	2.31	(35.24)	↓	8.48
NSE 20 Share Index	1,792.92	1,785.26	0.43	↑	(5.76)
NSE All Share Index	146.81	147.21	(0.27)	↓	(11.80)
FTSE NSE KENYA 15 Index	170.14	170.14	-	-	(18.48)
FTSE NSE Kenya 25 Index	170.32	170.32	-	-	(23.90)
FTSE NSE KENYA Gov't bond index	94.70	94.70	-	-	(1.42)
Foreign buys	203,749,305	63,342,852	221.66	↑	20.30
Foreign Sales	198,051,321	37,547,792	427.46	↑	(33.32)

(Source: NSE, AIB-AXYS)

CERTIFICATIONS & REQUIRED DISCLOSURES BEGIN ON PAGE 4

Foreign and Local Participation



(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
SCOM	199,088,250
TPSE	2,044,080
NMG	1,955,000
EQTY	329,175
IMH	170,000

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
SCOM	190,324,935
EABL	2,041,600
KEGN	1,989,782
NMG	1,955,000
WTK	750,000

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Top Traders (Ksh)	
SCOM	235,368,115
EABL	7,874,050
KCB	5,323,005
SCBK	4,349,175
EQTY	2,403,800
KEGN	2,180,840
TPSE	2,082,335
NMG	2,049,375
DTK	1,999,200
ABSA	1,717,560
IMH	1,213,800
KPLC	1,139,858
COOP	921,885
WTK	750,000
NCBA	744,945

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	17-Aug-22	16-Aug-22	15-Aug-22	12-Aug-22
NSE 20	1792.92	1785.26	1794.18	1799.46
NASI	146.81	147.21	147.03	146.88
Market Cap (KES Bn)	2288.20	2294.44	2291.71	2289.34
Equity + I Reit turnover (KES Bn)	0.27	0.19	0.22	0.09
Bond Turnover (KES Bn)	1.50	2.31	0.71	1.99

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET

Secondary bond market turnover was down, decreasing **35.24%** to **KES 1.50Bn** from **KES 2.31Bn** worth of bonds traded previously. The **FXD1/2008/20** was the day's most traded bonds. The **FTSE Bond index was maintained at 94.70.**

DERIVATIVES

Total volume contracts traded down at **3** with a value of KES **74,270** from **13** with a value of **KES 307,610** in the previous session. Total open interest contracts was up at **264.**

CURRENCY

The currency depreciated against the greenback to trade at **KES 119.45** from **KES 119.41** in the previous session. On a year-to-date basis, the shilling has depreciated by **5.58%** as compared to a **3.64%** depreciation in 2021. We anticipate that diesel and petrol prices will continue to increase as they trail global crude oil prices that have been rising due to geopolitical tensions in Eastern Europe. This will exert more pressure on the shilling, which will likely lead to further depreciation.

As of August 12th, CBK's usable foreign exchange reserves stood at **USD 7,682 Million (4.43months of import cover)**

MONEY MARKET

Liquidity in the money markets eased with the interbank rate decreasing to **5.54%**, compared to **5.55%** recorded the previous day.

MACRO-ECONOMIC DATA

Macroeconomic data	Current	Previous
GDP (2022 vs 2021)	6.80%	2.70%
Inflation (July)	8.30%	7.90%
Private Sector Credit Growth (Mar)	10.9%	9.10%
Money Supply Growth (Mar)	4.70%	4.40%
Forex Reserves(USD M)	7,982	8,028
Public Debt (Bn) (Dec)	8206.74	8117.36
Stanbic Kenya PMI (Jun)	46.80	48.20

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
LBTY	0.60	9.77%	6.74	6.14	1,348	200	-	-
SCAN	0.23	6.34%	3.86	3.63	27,816	7,200	-	-
CABL	0.07	5.88%	1.26	1.19	44,564	35,500	-	-
CTUM	0.38	3.98%	9.92	9.54	182,388	18,400	-	5,820
SMER	0.14	3.91%	3.72	3.58	744	200	-	-
CARB	0.40	3.46%	11.95	11.55	33,405	2,800	-	-
BAT	10.00	2.33%	440.00	430.00	132,000	300	132,000	-
HFCK	0.07	1.98%	3.61	3.54	15,864	4,400	-	-
SASN	0.40	1.80%	22.60	22.20	2,260	100	-	-
NBV	0.06	1.79%	3.42	3.36	172,374	50,400	-	-
BAMB	0.65	1.75%	37.80	37.15	196,460	5,200	-	-
FTGH	0.02	1.52%	1.34	1.32	402	300	-	-
XPRS	0.05	1.37%	3.70	3.65	739	200	-	-
KNRE	0.02	0.95%	2.12	2.10	57,473	27,100	-	-
NCBA	0.20	0.75%	26.90	26.70	744,945	27,700	-	-
KCB	0.25	0.58%	43.20	42.95	5,323,005	123,200	-	-
ABSA	0.05	0.41%	12.30	12.25	1,717,560	139,900	-	-
KEGN	0.01	0.27%	3.78	3.77	2,180,840	576,400	-	1,989,782
ARM	-	0.00%	5.55	5.55	-	-	-	-
BOC	-	0.00%	71.25	71.25	-	-	-	-
CGEN	-	0.00%	44.00	44.00	8,800	200	-	-
COOP	-	0.00%	12.65	12.65	921,885	72,800	-	-
CRWN	-	0.00%	42.90	42.90	-	-	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
DTK	-	0.00%	51.00	51.00	1,999,200	39,200	-	51,000
EGAD	-	0.00%	13.80	13.80	2,760	200	-	-
GLD	-	0.00%	2,015.00	2,015.00	-	-	-	-
HAFR	-	0.00%	0.36	0.36	31,582	88,100	-	-
JUB	-	0.00%	265.00	265.00	-	-	-	-
KPLC	-	0.00%	1.44	1.44	1,139,858	793,100	-	-
KQ	-	0.00%	3.83	3.83	-	-	-	-
KUKZ	-	0.00%	400.00	400.00	440,000	1,100	-	360,000
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LIMT	-	0.00%	500.00	500.00	-	-	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
NSE	-	0.00%	8.00	8.00	307,142	38,400	-	-
OCH	-	0.00%	2.17	2.17	217	100	-	-
ORCH	-	0.00%	10.40	10.40	-	-	-	-
SBIC	-	0.00%	99.00	99.00	59,400	600	-	59,400
SCBK	-	0.00%	133.75	133.75	4,349,175	32,500	-	-
SCOM	-	0.00%	31.10	31.10	235,368,115	7,573,100	199,088,250	190,324,935
SLAM	-	0.00%	11.50	11.50	46,015	4,000	-	-
TCL	-	0.00%	1.25	1.25	250	200	-	-
UCHM	-	0.00%	0.27	0.27	1,781	6,500	-	-
UNGA	-	0.00%	29.50	29.50	-	-	-	-
FAHR	- 0.02	-0.28%	7.16	7.18	12,900	1,800	-	-
IMH	- 0.05	-0.29%	17.00	17.05	1,213,800	71,400	170,000	-
TPSE	- 0.05	-0.29%	16.95	17.00	2,082,335	122,800	2,044,080	-
SGL	- 0.05	-0.34%	14.70	14.75	2,940	200	-	-
CIC	- 0.01	-0.48%	2.07	2.08	112,796	54,600	-	-
UMME	- 0.12	-1.53%	7.70	7.82	770	100	-	-
BRIT	- 0.10	-1.56%	6.32	6.42	53,120	8,400	-	-
PORT	- 0.14	-1.83%	7.50	7.64	750	100	-	-
EQTY	- 1.00	-1.91%	51.25	52.25	2,403,800	47,000	329,175	332,800
EABL	- 3.75	-2.40%	152.50	156.25	7,874,050	51,600	30,800	2,041,600
EVRD	- 0.02	-2.41%	0.81	0.83	4,437	5,500	-	-
NMG	- 0.50	-2.49%	19.55	20.05	2,049,375	104,800	1,955,000	1,955,000
WTK	- 4.00	-2.60%	150.00	154.00	750,000	5,000	-	750,000
LKL	- 0.17	-4.86%	3.33	3.50	276,234	82,900	-	180,984
BKG	- 2.25	-6.96%	30.10	32.35	51,135	1,700	-	-
TOTL	- 2.35	-9.09%	23.50	25.85	70,500	3,000	-	-
KAPC	- 9.50	-9.45%	91.00	100.50	9,100	100	-	-

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