



Daily Market Report 24th November 2022

Top Gainers

Company	(%)	Vol.
EVRD	10.00%	3,300
UNGA	9.66%	6,900
HFCK	6.08%	4,700
NCBA	5.27%	31,900
SLAM	3.06%	500

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
XPRS	-8.54%	100
WTK	-7.33%	100
UCHM	-3.57%	1,500
JUB	-2.75%	4,100
FTGH	-2.59%	4,500

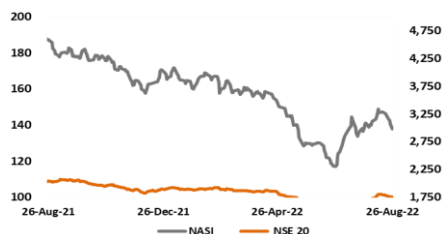
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
SCOM	1,180,300
EABL	450,200
KPLC	433,600
KEGN	375,400
KCB	194,900

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

Currency	Today	Previous	% Δ
USD/KES	122.23	122.18	-0.04%
EUR/KES	126.23	126.01	-0.17%
GBP/KES	146.29	145.21	-0.74%
JPY(100)/KES	88.09	86.44	-1.88%
YUAN/KES	17.13	17.08	-0.26%
RUPEE/KES	1.50	1.50	0.02%
KES/UGS	30.61	30.65	0.12%
KES/TZS	19.08	19.09	0.06%
RAND/KES	7.22	7.07	-2.04%

(Source: NSE, AIB-AXYS)

Dear Investor,

The following are today's highlights:

EQUITIES

The benchmark indices recorded downward trends with the NASI down **0.22%** and NSE 20 down **0.06%** to close at **KES 127.51** and **KES 1,643.03** respectively. The movement took the YTD performance for the **NASI** and **NSE 20** to **(23.40%)** and **(13.64%)** respectively.

Equities market turnover at the NSE decreased by **81.87%** to **KES 122.44Mn** from **KES 675.49Mn** recorded in the previous session. The top traders were **EABL, SCOM** and **KCB**. The counters' turnover stood at **KES 75Mn**, **KES 29Mn** and **KES 7Mn**, respectively. The largest stock gainers were **EVRD** with an increase of **10.00%** while the largest loser was **XPRS** with a decrease of **8.54%**.

Foreign investors were net buyers recording net inflows of **KES 28Mn** as compared to net outflows of **KES 346Mn** in the previous session. In terms of company-specific foreign activity, **EABL** was a net buyer, **SCOM** and **KCB** were net sellers.

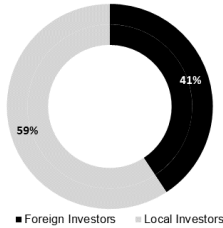
SUMMARY OF MARKET STATISTICS

	Today	Previous	%	Trend	YTD
Equity Turnover	122,437,716	675,485,137	(81.87)	↓	(64.48)
Total Volume Traded	3,243,200	21,438,100	(84.87)	↓	(68.16)
Market Cap (Bn)	1,986.70	1,991.00	(0.22)	↓	(23.38)
Bond Turnover (Bn)	1.82	2.89	(37.05)	↓	31.98
NSE 20 Share Index	1,643.03	1,643.95	(0.06)	↓	(13.64)
NSE All Share Index	127.51	127.79	(0.22)	↓	(23.40)
Foreign buys	63,765,685	204,822,620	(68.87)	↓	(62.35)
Foreign Sales	35,998,720	551,126,752	(93.47)	↓	(87.88)

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
EABL	47,474,700
SCOM	14,136,590
EQTY	864,395
KCB	855,000
BAT	435,000

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
SCOM	17,342,255
EABL	14,508,925
KCB	3,090,000
BAT	435,000
NCBA	265,600

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Company	Vol.
EABL	74,768,100
SCOM	29,301,385
KCB	7,311,290
SCBK	1,770,675
KEGN	1,236,093
EQTY	1,158,625
NCBA	1,019,300
COOP	868,400
JUB	797,900
KPLC	650,996
BAT	606,200
CARB	583,280
ABSA	365,410
CTUM	332,144
BAMB	244,800

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	24-Nov-22	23-Nov-22	22-Nov-22	21-Nov-22
NSE 20	1643.03	1643.95	1640.56	1659.51
NASI	127.51	127.79	127.55	128.89
Market Cap (KES Bn)	1,986.70	1,991.00	1,987.28	2008.20
Equity + I Reit turnover (KES Bn)	1.22	6.75	1.77	3.69
Bond Turnover (KES Bn)	1.82	2.89	3.49	3.14

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET

Secondary bond market turnover was down, decreasing by **37.05%** to **KES 1.82Bn** from **KES 2.89Bn** worth of bonds traded previously. The **FXD1/2018/15YR** was the day's most traded bond.

DERIVATIVES

Total volume contracts traded down at **2** with a value of **KES 28,010** from **6** with a value of **KES 100,710** in the previous session. Total open interest contracts increased at **374**.

CURRENCY

The currency depreciated against the greenback to trade at **KES 122.23** from **KES 122.18** in the previous session. On a year-to-date basis, the shilling has depreciated by **8.03%** as compared to a **3.64%** depreciation in 2021. We expect the local currency to continue under pressure due to the increased dollar demand from energy importers on the back of the prevailing high global oil prices, and reduced dollar inflows from key export-earning sectors. Additionally, the depreciation is driven by the continued strengthening of the dollar against other currencies.

As of September 30th, CBK's usable foreign exchange reserves stood at **USD 7,424 Million (4.19 months of import cover)**.

MONEY MARKET

Liquidity in the money markets tightened with the interbank rate increasing to **4.83%**, compared to **4.72%** recorded the previous day.

MACRO-ECONOMIC DATA

Macroeconomic data	Current	Previous
GDP (Q2'22 Compared to Q1'21)	5.20%	6.80%
Inflation (Oct 22)	9.60%	9.20%
Stanbic Kenya PMI (Oct 22)	50.20	51.70
Private Sector Credit Growth (Mar 22)	10.9%	9.10%
Forex Reserves(USD M)	7,424	7,448
Public Debt (Tn) (Jun '22 Compared to June '21)	8.58	7.70

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
EVRD	0.07	10.00%	0.77	0.70	2,532	3,300	-	-
UNGA	2.80	9.66%	31.80	29.00	3,180	100	-	-
HFCK	0.18	6.08%	3.14	2.96	14,740	4,700	-	-
NCBA	1.60	5.27%	31.95	30.35	1,019,300	31,900	-	265,600
SLAM	0.26	3.06%	8.76	8.50	4,380	500	-	-
HAFR	0.01	2.70%	0.38	0.37	23,240	61,200	-	-
FAHR	0.16	2.61%	6.30	6.14	41,548	6,600	-	-
NMG	0.25	1.56%	16.30	16.05	8,150	500	-	-
SCBK	2.00	1.42%	142.75	140.75	1,770,675	12,400	-	-
PORT	0.10	1.27%	7.98	7.88	798	100	-	-
CIC	0.02	1.02%	1.98	1.96	30,326	15,300	-	-
TCL	0.01	1.02%	0.99	0.98	38,859	39,300	-	4,095
EQTY	0.45	1.00%	45.45	45.00	1,158,625	25,500	864,395	-
LBTY	0.03	0.63%	4.83	4.80	6,756	1,400	-	-
KEGN	0.02	0.61%	3.29	3.27	1,236,093	375,400	-	-
CARB	0.05	0.36%	13.95	13.90	583,280	41,800	-	116,200
NSE	0.02	0.30%	6.78	6.76	212,204	31,300	-	-
KCB	0.05	0.13%	37.50	37.45	7,311,290	194,900	855,000	3,090,000
ARM	-	0.00%	5.55	5.55	-	-	-	-
BKG	-	0.00%	27.00	27.00	-	-	-	-
BOC	-	0.00%	70.00	70.00	21,000	300	-	21,000
BRIT	-	0.00%	5.48	5.48	119,508	21,800	-	-
CGEN	-	0.00%	41.55	41.55	-	-	-	-
CRWN	-	0.00%	39.15	39.15	-	-	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
EGAD	-	0.00%	11.50	11.50	-	-	-	-
GLD	-	0.00%	2,100.00	2,100.00	-	-	-	-
IMH	-	0.00%	17.00	17.00	25,500	1,500	-	-
KAPC	-	0.00%	105.00	105.00	-	-	-	-
KQ	-	0.00%	3.83	3.83	-	-	-	-
KUKZ	-	0.00%	380.00	380.00	-	-	-	-
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LIMT	-	0.00%	420.00	420.00	42,000	100	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
OCH	-	0.00%	3.00	3.00	-	-	-	-
ORCH	-	0.00%	10.40	10.40	-	-	-	-
SASN	-	0.00%	21.00	21.00	65,100	3,100	-	-
SCAN	-	0.00%	2.97	2.97	4,455	1,500	-	-
SGL	-	0.00%	9.90	9.90	2,970	300	-	-
TOTL	-	0.00%	25.00	25.00	-	-	-	-
EABL	(0.75)	-0.45%	166.00	166.75	74,768,100	450,200	47,474,700	14,508,925
BAT	(2.00)	-0.46%	433.00	435.00	606,200	1,400	435,000	435,000
KNRE	(0.01)	-0.55%	1.80	1.81	40,850	22,700	-	-
UMME	(0.04)	-0.59%	6.76	6.80	59,540	8,800	-	-
SCOM	(0.15)	-0.60%	24.85	25.00	29,301,385	1,180,300	14,136,590	17,342,255
TPSE	(0.10)	-0.77%	12.90	13.00	215,645	16,700	-	215,645
SBIC	(0.75)	-0.78%	95.50	96.25	19,100	200	-	-
ABSA	(0.10)	-0.86%	11.50	11.60	365,410	31,800	-	-
NBV	(0.03)	-0.87%	3.40	3.43	109,834	32,300	-	-
CTUM	(0.08)	-1.00%	7.96	8.04	332,144	41,700	-	-
CABL	(0.01)	-1.10%	0.90	0.91	12,971	14,400	-	-
KPLC	(0.02)	-1.32%	1.50	1.52	650,996	433,600	-	-
BAMB	(0.50)	-1.45%	34.00	34.50	244,800	7,200	-	-
COOP	(0.20)	-1.59%	12.40	12.60	868,400	70,000	-	-
LKL	(0.06)	-1.74%	3.38	3.44	153,630	45,500	-	-
DTK	(1.00)	-2.13%	46.00	47.00	69,000	1,500	-	-
SMER	(0.06)	-2.44%	2.40	2.46	15,387	6,400	-	-
FTGH	(0.03)	-2.59%	1.13	1.16	5,085	4,500	-	-
JUB	(5.50)	-2.75%	194.50	200.00	797,900	4,100	-	-
UCHM	(0.01)	-3.57%	0.27	0.28	408	1,500	-	-
WTK	(11.00)	-7.33%	139.00	150.00	13,900	100	-	-
XPRS	(0.28)	-8.54%	3.00	3.28	300	100	-	-

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