



Daily Market Report 20th September 2022

Top Gainers

Company	(%)	Vol.
OCH	7.36%	700
DTK	5.47%	6,900
FTGH	4.96%	200
UCHM	4.35%	70,400
PORT	3.24%	600

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
CRWN	-10.00%	18,400
TPSE	-9.76%	1,200
SLAM	-9.57%	10,400
EVRD	-7.79%	9,100
SGL	-7.29%	5,100

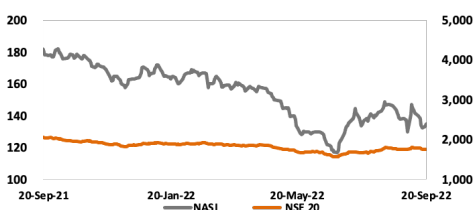
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
SCOM	5,351,600
NCBA	1,608,700
KPLC	1,236,500
IMH	482,100
KCB	474,200

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

Currency	Today	Previous	% Δ
USD/KES	120.46	120.43	-0.02%
EUR/KES	120.27	120.22	-0.04%
GBP/KES	137.42	137.99	0.41%
JPY(100)/KES	84.05	84.10	0.07%
YUAN/KES	17.18	17.18	-0.03%
RUPEE/KES	1.51	1.51	-0.15%
KES/UGS	31.71	31.68	-0.11%
KES/TZS	19.36	19.36	0.02%
RAND/KES	6.82	6.82	0.00%

(Source: NSE, AIB-AXYS)

Dear client,

The following are today's highlights:

EQUITIES

The benchmark indices recorded mixed trends with the NASI up **1.44%** and NSE 20 down **0.29%** to close at **KES 134.96** and **KES 1,748.95** respectively. The movement took the YTD performance for the **NASI** and **NSE 20** to **(18.92%)** and **(8.07%)** respectively.

Equities market turnover at the NSE decreased by **6.23%** to **KES 275.90Mn** from **KES 294.24Mn** recorded in the previous session. The top traders were **SCOM**, **NCBA** and **EABL**. The counters' turnover stood at **KES 147Mn**, **KES 50Mn** and **KES 23Mn**, respectively. The largest stock gainers were **OCH** with an increase of **7.36%** while the largest loser was **CRWN** with a decrease of **10.00%**.

Foreign investors were net sellers recording net outflows of **KES 144Mn** as compared to net outflows of **KES 18Mn** in the previous session. In terms of company-specific foreign activity, **SCOM**, **NCBA** and **EABL** were net sellers.

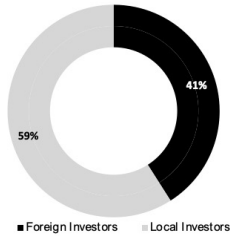
SUMMARY OF MARKET STATISTICS

	Today	Previous	%	Trend	YTD
Equity Turnover	275,904,234	294,244,932	(6.23)	↓	(19.97)
Total Volume Traded	11,364,400	11,348,900	0.14	↑	11.56
Market Cap (Bn)	2,103.12	2,073.14	1.45	↑	(18.89)
Bond Turnover (Bn)	2.55	1.68	52.13	↑	84.64
NSE 20 Share Index	1,748.95	1,753.97	(0.29)	↓	(8.07)
NSE All Share Index	134.96	133.04	1.44	↑	(18.92)
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	40,874,480	86,455,546	(52.72)	↓	(75.87)
Foreign Sales	185,211,468	104,423,260	77.37	↑	(37.64)

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
EABL	21,300,000
EQTY	12,638,360
KCB	4,251,000
SCOM	2,336,940
CRWN	328,860

(Source: NSE, AIB-AXYS)

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(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Top Traders (Ksh)	
SCOM	147,310,360
NCBA	49,852,270
EABL	22,803,250
KCB	18,531,280
EQTY	13,172,490
IMH	8,195,080
CARB	2,503,200
CTUM	2,413,030
KPLC	2,359,703
ABSA	2,182,120
KEGN	1,074,857
COOP	964,400
CRWN	720,795
TOTL	626,525
NMG	541,950

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	20-Sept-22	19-Sept-22	16-Sept-22	15-Sept-22
NSE 20	1748.95	1753.97	1747.84	1776.99
NASI	134.96	133.04	132.34	134.18
Market Cap (KES Bn)	2103.12	2073.14	2062.19	2090.83
Equity + I Reit turnover (KES Bn)	0.28	0.29	0.63	0.75
Bond Turnover (KES Bn)	2.55	1.68	2.39	3.07

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET

Secondary bond market turnover was up, increasing by **52.13%** to **KES 2.55Bn** from **KES 1.68Bn** worth of bonds traded previously. The **IFB/1/2015/12** was the day's most traded bond. The **FTSE Bond index was maintained at 94.70**.

DERIVATIVES

Total volume contracts traded down at **8** with a value of **KES 242,690** from **20** with a value of **KES 644,870** in the previous session. Total open interest contracts was up at **181**.

CURRENCY

The currency depreciated against the greenback to trade at **KES 120.46** from **KES 120.43** in the previous session. On a year-to-date basis, the shilling has depreciated by **6.47%** 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 September 16th, CBK's usable foreign exchange reserves stood at **USD 7,372 Million (4.2 months of import cover)**.

MONEY MARKET

Liquidity in the money markets tightened with the interbank rate increasing to **3.87%**, compared to **3.86%** recorded the previous day.

MACRO-ECONOMIC DATA

Macroeconomic data	Current	Previous
GDP (2022 vs 2021)	6.80%	2.70%
Inflation (August)	8.50%	8.30%
Private Sector Credit Growth (Mar)	10.9%	9.10%
Money Supply Growth (Mar)	4.70%	4.40%
Forex Reserves(USD M)	7,372	7,346
Public Debt (Bn) (Dec)	8206.74	8117.36
Stanbic Kenya PMI (Aug)	44.20	46.30

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	
OCH	0.19	7.36%	2.77	2.58	1,938	700	-	-	
DTK	2.75	5.47%	53.00	50.25	31,800	600	-	31,800	
FTGH	0.06	4.96%	1.27	1.21	254	200	-	-	
UCHM	0.01	4.35%	0.24	0.23	16,976	70,400	-	-	
PORT	0.22	3.24%	7.00	6.78	4,200	600	-	-	
SCOM	0.75	2.80%	27.55	26.80	147,310,360	5,351,600	2,336,940	135,836,670	
BAMB	0.85	2.56%	34.00	33.15	98,600	2,900	-	-	
CTUM	0.22	2.34%	9.62	9.40	2,413,030	250,600	-	-	
BAT	8.00	1.81%	450.00	442.00	225,000	500	-	225,000	
EABL	2.00	1.43%	142.00	140.00	22,803,250	160,600	21,300,000	21,784,125	
UMME	0.10	1.32%	7.70	7.60	2,310	300	-	-	
SASN	0.25	1.13%	22.35	22.10	31,310	1,400	-	-	
SCBK	0.75	0.55%	138.25	137.50	400,700	2,900	-	68,800	
EQTY	0.15	0.32%	47.00	46.85	13,172,490	280,200	12,638,360	11,936,850	
IMH	0.05	0.29%	17.00	16.95	8,195,080	482,100	17,000	-	
SBIC	0.25	0.26%	97.75	97.50	29,325	300	-	-	
ARM	-	0.00%	5.55	5.55	-	-	-	-	
BKG	-	0.00%	27.90	27.90	-	-	-	-	
BOC	-	0.00%	77.00	77.00	-	-	-	-	
COOP	-	0.00%	12.15	12.15	964,400	79,400	-	118,030	
DCON	-	0.00%	0.45	0.45	-	-	-	-	
EGAD	-	0.00%	13.45	13.45	1,345	100	-	-	
GLD	-	0.00%	1,975.00	1,975.00	-	-	-	-	
HAFR	-	0.00%	0.38	0.38	30,768	80,300	-	-	
JUB	-	0.00%	245.00	245.00	-	-	-	-	
KQ	-	0.00%	3.83	3.83	-	-	-	-	
KUKZ	-	0.00%	390.00	390.00	-	-	-	-	
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-	
LBTY	-	0.00%	7.00	7.00	3,500	500	-	-	
LIMIT	-	0.00%	441.00	441.00	-	-	-	-	
MSC	-	0.00%	0.28	0.28	-	-	-	-	
NCBA	-	0.00%	31.00	31.00	49,852,270	1,608,700	-	567,300	
ORCH	-	0.00%	10.40	10.40	-	-	-	-	
UNGA	-	0.00%	31.00	31.00	3,100	100	-	-	
WTK	-	0.00%	159.00	159.00	15,900	100	-	-	
LKL	(0.01)	-0.25%	4.00	4.01	800	200	-	-	
HFCK	(0.01)	-0.29%	3.41	3.42	94,863	27,800	-	-	
FAHR	(0.04)	-0.57%	6.94	6.98	111,014	16,000	-	-	
ABSA	(0.10)	-0.85%	11.60	11.70	2,182,120	188,400	2,320	432,045	
KCB	(0.35)	-0.89%	39.10	39.45	18,531,280	474,200	4,251,000	11,794,620	
KNRE	(0.03)	-1.45%	2.04	2.07	61,334	30,100	-	-	
BRIT	(0.10)	-1.56%	6.32	6.42	262,670	41,500	-	-	
TCL	(0.02)	-1.61%	1.22	1.24	2,068	1,700	-	-	
CABL	(0.02)	-1.71%	1.15	1.17	202,581	175,900	-	-	
KAPC	(2.00)	-1.90%	103.50	105.50	134,675	1,300	-	-	
KEGN	(0.07)	-1.90%	3.61	3.68	1,074,857	298,100	-	90,788	
NSE	(0.18)	-2.32%	7.58	7.76	61,460	8,100	-	-	
KPLC	(0.05)	-2.55%	1.91	1.96	2,359,703	1,236,500	-	-	
CGEN	(1.15)	-2.63%	42.60	43.75	89,500	2,100	-	-	
SMER	(0.10)	-2.90%	3.35	3.45	6,036	1,800	-	-	
CARB	(0.35)	-2.93%	11.60	11.95	2,503,200	215,400	-	2,325,440	
CIC	(0.07)	-3.33%	2.03	2.10	241,131	118,600	-	-	
SCAN	(0.14)	-3.85%	3.50	3.64	206,956	59,100	-	-	
TOTL	(1.00)	-4.22%	22.70	23.70	626,525	27,600	-	-	
NBV	(0.21)	-6.03%	3.27	3.48	13,410	4,100	-	-	
XPRS	(0.23)	-6.57%	3.27	3.50	982	300	-	-	
NMG	(1.30)	-7.18%	16.80	18.10	541,950	32,300	-	-	
SGL	(0.90)	-7.29%	11.45	12.35	58,270	5,100	-	-	
EVRD	(0.06)	-7.79%	0.71	0.77	6,503	9,100	-	-	
SLAM	(1.10)	-9.57%	10.40	11.50	108,160	10,400	-	-	
TPSE	(1.60)	-9.76%	14.80	16.40	17,760	1,200	-	-	
CRWN	(4.35)	-10.00%	39.15	43.50	720,795	18,400	328,860	-	



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