



Daily Market Report 01st August 2022

Top Gainers

Company	(%)	Vol.
XPRS	9.57%	200
TCL	7.14%	6,900
BRIT	3.29%	1,100
SASN	2.94%	300
TOTL	2.90%	1,400

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
NBV	-3.38%	103,100
UMME	-2.97%	48,200
KPLC	-2.86%	5,128,500
HAFR	-2.78%	1,022,500
SCOM	-2.67%	3,002,100

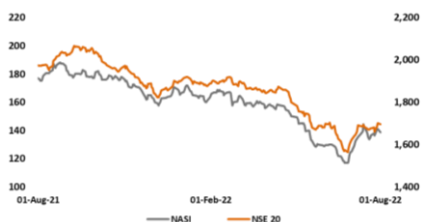
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
KPLC	5,128,500
SCOM	3,002,100
KCB	1,318,000
HAFR	1,022,500
KEGN	979,100

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

	Today	Previous	% Δ
USD/KES	118.85	118.80	-0.04%
EUR/KES	121.22	120.67	-0.46%
GBP/KES	144.43	143.69	-0.51%
JPY(100)/KES	88.68	89.38	0.79%
YUAN/KES	17.63	17.62	-0.06%
RUPEE/KES	1.50	1.50	-0.21%
KES/UGS	32.48	32.64	0.50%
KES/TZS	19.62	19.63	0.04%
RAND/KES	7.19	7.22	0.39%

(Source: NSE, AIB-AXYS)

Dear client,

The following are today's highlights:

EQUITIES

The benchmark indices recorded bearish trends with the NASI down **1.55%** and NSE 20 down **0.25%** to close at **KES 138.87** and **KES 1,697.03** respectively. The movement took the YTD performance for the **NASI** and **NSE 20** to **(16.57%)** and **(10.80%)** respectively.

Equities market turnover at the NSE decreased by **55.01%** to **KES 0.24Bn** from **KES 0.53Bn** recorded in the previous session. The top traders were **SCOM, KCB** and **EABL**. The counters' turnover stood at **KES 87Mn, KES 54Mn** and **KES 49Mn**, respectively. The largest stock gainers were **XPRS** with an increase of **9.57%** while the largest loser was **NBV** with a decrease of **3.38%**.

Foreign investors were net sellers recording net outflows of **KES 359Mn** as compared to net outflows of **KES 66Mn** in the previous session. In terms of company-specific foreign activity, **SCOM** and **KCB** were net sellers while **EABL** was a net buyer.

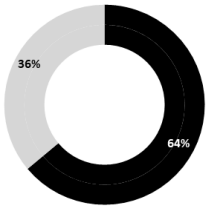
SUMMARY OF MARKET STATISTICS

	Today	Previous	%	Trend	YTD
Equity Turnover	237,186,158	527,235,924	(55.01)	↓	(31.20)
Total Volume Traded	13,012,100	13,163,300	(1.15)	↓	27.73
Market Cap (Bn)	2,164.26	2,198.26	(1.55)	↓	(16.53)
Bond Turnover (Bn)	2.31	5.40	(57.16)	↓	67.59
NSE 20 Share Index	1,697.03	1,701.31	(0.25)	↓	(10.80)
NSE All Share Index	138.87	141.05	(1.55)	↓	(16.57)
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	125,138,028	29,335,364	326.58	↑	(26.12)
Foreign Sales	178,114,598	408,823,755	(56.43)	↓	(40.03)

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



■ Foreign Investors ■ Local Investors

(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
SCOM	64,873,765
EABL	45,427,950
JUB	14,118,300
DTK	475,300
EQTY	190,000

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
SCOM	79,234,840
EABL	43,115,050
KCB	40,950,000
JUB	11,528,700
KEGN	1,598,188

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Company	Vol.
SCOM	87,497,590
KCB	53,727,410
EABL	49,409,275
JUB	14,392,200
KPLC	6,959,132
SCBK	5,556,725
KEGN	3,418,032
WTK	3,272,800
ABSA	2,541,000
COOP	1,711,340
IMH	1,701,720
EQTY	1,503,130
NSE	1,048,470
DTK	936,100
BAMB	674,875

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	01-Aug-22	29-July-22	28-July-22	27-July-22
NSE 20	1697.03	1,701.31	1,675.02	1,676.18
NASI	138.87	141.05	140.48	138.51
Market Cap (KES Bn)	2164.26	2198.26	2169.29	2128.54
Equity + I Reit turnover (KES Bn)	0.24	0.53	0.32	0.29
Bond Turnover (KES Bn)	2.31	5.40	5.81	6.14

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET

Secondary bond market turnover was down, decreasing **57.16%** to **KES 2.31Bn** from **KES 5.40Bn** worth of bonds traded previously. The **FXDI/2008/20** and **FXDI/2014/10** were the day's most traded bonds. The **FTSE Bond index was maintained at 94.70**.

DERIVATIVES

Total volume contracts traded down at **12** with a value of **KES 350,700** from **25** with a value of **KES670,640** in the previous session. Total open interest contracts was up at **260**.

CURRENCY

The currency depreciated against the greenback to trade at **KES 118.85** from **KES 118.80** in the previous session. On a year-to-date basis, the shilling has depreciated by **5.05%** 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 July 29th, CBK's usable foreign exchange reserves stood at **USD 7,740 Million (4.46 months of import cover)**

MONEY MARKET

Liquidity in the money markets eased with the interbank rate increasing to **5.34%**, compared to **5.47%** 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
XPRS		0.31	9.57%	3.55	3.24	710	200	355	-
TCL		0.08	7.14%	1.20	1.12	14,520	12,100	-	-
BRIT		0.20	3.29%	6.28	6.08	6,912	1,100	-	-
SASN		0.60	2.94%	21.00	20.40	6,300	300	-	-
TOTL		0.65	2.90%	23.05	22.40	32,250	1,400	-	-
SBIC		2.00	2.09%	97.50	95.50	97,375	1,000	-	-
ABSA		0.20	1.81%	11.25	11.05	2,541,000	226,100	-	-
FTGH		0.02	1.55%	1.31	1.29	16,038	12,200	-	-
LKL		0.05	1.54%	3.29	3.24	16,755	5,100	-	-
CARB		0.15	1.30%	11.70	11.55	53,900	4,600	-	-
FAHR		0.08	1.22%	6.62	6.54	88,030	13,300	-	-
SCBK		1.50	1.13%	134.50	133.00	5,556,725	41,300	-	94,500
BAMB		0.30	0.91%	33.40	33.10	674,875	20,200	-	-
HFCK		0.03	0.90%	3.36	3.33	26,565	7,900	-	-
CABL		0.01	0.88%	1.15	1.14	1,610	1,400	-	-
NMG		0.10	0.52%	19.20	19.10	485,430	25,300	-	452,820
CRWN		0.20	0.50%	40.00	39.80	40,000	1,000	-	-
JUB		0.25	0.10%	249.00	248.75	14,392,200	57,800	14,118,300	11,528,700
ARM		-	0.00%	5.55	5.55	-	-	-	-
BAT		-	0.00%	440.00	440.00	88,000	200	-	-
BKG		-	0.00%	29.00	29.00	-	-	-	-
BOC		-	0.00%	80.00	80.00	-	-	-	-
DCON		-	0.00%	0.45	0.45	-	-	-	-
DTK		-	0.00%	49.00	49.00	936,100	19,100	475,300	499,800
EGAD		-	0.00%	13.70	13.70	-	-	-	-
EVRD		-	0.00%	0.75	0.75	675	900	-	-
GLD		-	0.00%	2,015.00	2,015.00	-	-	-	-
IMH		-	0.00%	17.00	17.00	1,701,720	100,100	-	-
KEGN		-	0.00%	3.49	3.49	3,418,032	979,100	52,350	1,598,188
KNRE		-	0.00%	2.00	2.00	39,540	19,800	-	-
KQ		-	0.00%	3.83	3.83	-	-	-	-
KUKZ		-	0.00%	367.50	367.50	-	-	-	-
KURV		-	0.00%	1,500.00	1,500.00	-	-	-	-
LBTY		-	0.00%	5.60	5.60	-	-	-	-
LIMT		-	0.00%	462.00	462.00	-	-	-	-
MSC		-	0.00%	0.28	0.28	-	-	-	-
OCH		-	0.00%	2.30	2.30	230	100	-	-
ORCH		-	0.00%	10.40	10.40	-	-	-	-
PORT		-	0.00%	7.70	7.70	7,700	1,000	-	-
SGL		-	0.00%	12.50	12.50	1,250	100	-	-
SLAM		-	0.00%	12.00	12.00	-	-	-	-
SMER		-	0.00%	3.97	3.97	-	-	-	-
TPSE		-	0.00%	17.00	17.00	-	-	-	-
UCHM		-	0.00%	0.21	0.21	20,273	96,200	-	-
UNGA		-	0.00%	29.50	29.50	-	-	-	-
EABL	-	0.25	-0.16%	155.00	155.25	49,409,275	319,000	45,427,950	43,115,050
WTK	-	0.50	-0.33%	151.50	152.00	3,272,800	21,600	-	-
CGEN	-	0.25	-0.58%	42.80	43.05	38,540	900	-	-
EQTY	-	0.30	-0.62%	47.70	48.00	1,503,130	31,500	190,000	640,700
SCAN	-	0.03	-0.87%	3.41	3.44	22,175	6,500	-	-
KAPC	-	1.00	-0.93%	107.00	108.00	21,400	200	-	-
KCB	-	0.40	-0.97%	40.75	41.15	53,727,410	1,318,000	-	40,950,000
NCBA	-	0.30	-1.20%	24.65	24.95	155,255	6,300	-	-
CIC	-	0.03	-1.47%	2.01	2.04	94,353	46,900	-	-
CTUM	-	0.14	-1.50%	9.18	9.32	311,158	33,900	-	-
NSE	-	0.12	-1.58%	7.48	7.60	1,048,470	140,100	-	-
COOP	-	0.25	-2.10%	11.65	11.90	1,711,340	147,200	-	-
SCOM	-	0.80	-2.67%	29.15	29.95	87,497,590	3,002,100	64,873,765	79,234,840
HAFR	-	0.01	-2.78%	0.35	0.36	353,122	1,022,500	-	-
KPLC	-	0.04	-2.86%	1.36	1.40	6,959,132	5,128,500	-	-
UMME	-	0.22	-2.97%	7.18	7.40	345,808	48,200	-	-
NBV	-	0.12	-3.38%	3.43	3.55	353,401	103,100	-	-

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