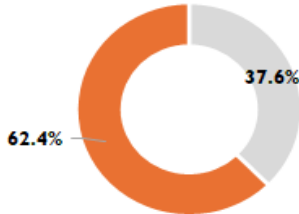


Top Traded

Company	Closing Price	Turnover (KES Mn)
KCB Group	38.30	201.17
Safaricom	17.65	127.22
Britam Holdings	6.80	102.91
Standard Chartered Kenya	299.00	17.43
Equity Group	44.60	8.94

Source: NSE, AIB-AXYS Research

Participation Mix



Foreign Participation Local Participation

Source: NSE, AIB-AXYS Research

Top Gainers

Company	Closing Price	% Change
Sanlam Kenya	10.35	▲ 8.9%
Longhorn Publishers	3.00	▲ 7.9%
Liberty Kenya	11.45	▲ 7.5%
Centum Investments	12.65	▲ 4.5%
Nairobi Business Ventures	1.98	▲ 4.2%

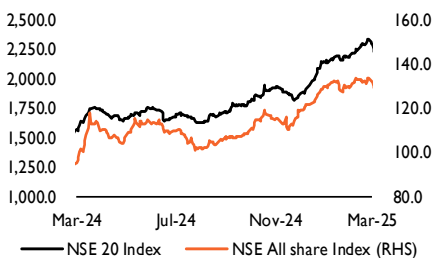
Source: NSE, AIB-AXYS Research

Top Losers

Company	Closing Price	% Change
Unga Group	23.20	▼ (9.9%)
Africa Mega Agricorp Plc	3.17	▼ (8.4%)
WPP Scangroup	2.99	▼ (6.6%)
Express Kenya	3.56	▼ (6.3%)
HF Group	6.12	▼ (6.1%)

Source: NSE, AIB-AXYS Research

Equities Indices Trend



Source: CBK, NSE, AIB-AXYS Research

Market Summary

Statistic	Today	Previous	% change
Equity Turnover (KES, Mn)	480.96	314.37	▲ 53.0%
Market Cap (KES Bn)	1,992.77	1,976.19	▲ 0.8%
Nairobi All-Share Index	126.78	125.76	▲ 0.8%
NSE-10 Index	1,291.33	1,277.04	▲ 1.1%
NSE-20 Index	2,166.25	2,138.65	▲ 1.3%
NSE-25 Index	3,420.07	3,387.48	▲ 1.0%
Foreigner buys (KES Mn)	49.42	68.02	▼ (27.3%)
Foreigner sales (KES Mn)	311.83	222.73	▲ 40.0%
Net foreign flows (KES, Mn)	(262.41)	(154.71)	▲ 69.6%

Source: NSE, AIB-AXYS Research

Top Foreigner Buys

Company	Closing Price	Turnover (KES Mn)
Safaricom	17.65	46.82
Equity Group	44.60	2.06
KCB Group	38.30	0.19
Standard Chartered Kenya	299.00	0.149
Co-operative Bank	16.00	0.067

Source: NSE, AIB-AXYS Research

Top Foreigner Sales

Company	Closing Price	Turnover (KES Mn)
KCB Group	38.30	195.32
Safaricom	17.65	107.37
Equity Group	44.60	8.06
Diamond Trust Bank	70.25	1.08

Equities Highlights

- ❖ The market registered bullish sentiments evidenced by the **0.8%** uptick in the Nairobi All-Share index (NASI) to close at **126.78 points**. This was majorly attributed to the gains by large-cap stocks such as Co-operative Bank, KCB Group, Equity Bank, and Safaricom, by **2.2%, 2.0%, 1.1%, and 0.6%** respectively. This performance extends gains from the previous session, as the market rebounded from early-week declines triggered by jitters over new U.S. trade tariffs. However, bullish sentiment emerged yesterday and continued today after the U.S. government delayed tariffs for 90 days on non-retaliating countries.
- ❖ Trading activity increased by **53.0%** in the day to **KES 480.96 Mn up from KES 314.37 Mn** in the previous session.
- ❖ Foreign investors remained net sellers, recording net outflows totaling **KES 262.41 Mn** compared to net outflows totaling **KES 154.71 Mn** recorded in the previous session.
- ❖ KCB Group was the most traded counter of the day with aggregate turnover clocking **KES 201.17 Mn**, with Safaricom coming in as the second most traded counter with the cumulative turnover coming in at **KES 127.22 Mn**.

Capital News Update

- ❖ Sameer Africa - Audited Consolidated Results for the Year Ended 31-Dec-2024 ([here](#))
- ❖ TotalEnergies Marketing Kenya PLC- Appointment of a Non- Executive Director ([here](#))
- ❖ Jubilee Holdings Limited - Audited Consolidated Results for the Year Ended 31-Dec-2024 ([here](#))

Daily Market Watch

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Fixed Income Stats

Statistic	Today	Previous	Δ
Bond Turnover (Bns)	10.66	19.03	▼ (44.0%)
No. of trades	238	168	▲ 41.7%
Bond Index	1,167.54	1,163.71	▲ 0.3%
91-day rate	8.50%	8.63%	▼ (13 bps)
182-day rate	8.89%	9.04%	▼ (14 bps)
364-day rate	10.23%	10.39%	▼ (15 bps)
Interbank Rate	10.12%	10.30%	▼ (17 bps)

Source: CBK, NSE, AIB-AXYS Research

Exchange Rates

Currency	Today	Previous	% Change
US Dollar	129.71	129.67	▼ (3 bps)
Euro	146.61	142.54	▼ (278 bps)
Sterling Pound	166.82	166.85	▲ 2 bps
Japanese Yen	90.57	88.48	▼ (230 bps)
Chinese Yuan	17.72	17.66	▼ (32 bps)
Indian Rupee	1.51	1.50	▼ (36 bps)
S. Africa Rand	6.68	6.72	▲ 50 bps
KES/UG Shilling	28.41	28.57	▼ (57 bps)
KES/TZ Shilling	20.62	20.75	▼ (59 bps)

Source: CBK, AIB-AXYS Research

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Summary Macroeconomic Stats

Statistic	Updated as of:	Current	Previous	Δ
GDP Growth	Q3 2024	4.0%	4.6%	▼ (60 bps)
Headline Inflation	March-25	3.6%	3.5%	▲ 10 bps
Central Bank Rate	April-25	10.0%	10.8%	▼ (75 bps)
Stanbic Kenya PMI	March-25	51.7	50.6	▲ 1.1 pts
Private Sector Credit Growth	March-25	0.2%	-1.4%	▲ 160 bps
Forex Reserves (USD M)	March-25	9.956	9.057	▼ (99.9%)
Public Debt (KES Tn)	June-24	10.56	10.44	▲ 1.2%

Source: CBK, KNBS, Stanbic Bank Kenya, AIB-AXYS Research

Fixed Income Highlights

- ❖ Secondary bond market turnover decreased by **44.0%** to **KES 10.66 Bn** from **KES 19.03 Bn** worth of bonds traded previously.
- ❖ The highest-grossing bond of the day was the **IFBI/2023/6.5Yr**, while the most frequently traded bond of the day was **IFBI/2023/17Yr**.

Derivatives Highlights

- ❖ Total value of contracts traded remained at **0**, while the volume of traded contracts remained constant at **0**
- ❖ The number of open interest contracts remained unchanged at **9**

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