



Daily Market Report 17th August, 2020.

Top Gainers

Company	(%)	Vol.
CGEN	9.74%	1,300
XPRS	9.74%	100
NBV	7.14%	2,200
FAHR	5.90%	6,100
EQTY	5.22%	1,548,300

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
SGL	-9.78%	100
HAFR	-8.89%	13,300
LKL	-7.35%	4,700
UMME	-6.76%	500
SCAN	-4.94%	27,700

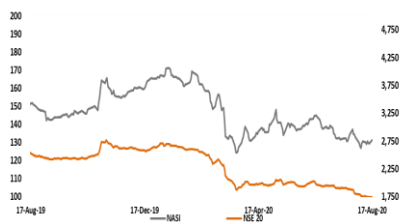
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
KNRE	6,518,700
COOP	4,477,200
KCB	3,312,500
SCOM	2,813,300
EQTY	1,548,300

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

	Today	Previous	% A
USD/KES	108.32	108.29	-0.03%
EUR/KES	128.00	128.18	0.141%
GBP/KES	141.97	141.24	-0.51%
JPY(100)/KES	101.63	101.31	-0.31%
YUAN/KES	15.61	15.59	-0.15%
RUPEE/KES	1.45	1.45	-0.01%
KES/UGS	33.90	33.94	0.11%
KES/TZS	21.46	21.47	0.03%
RAND/KES	6.24	6.22	-0.34%

(Source: NSE, AIB-AXYS)

Dear client,

Below are today highlights:

CURRENCY:

The shilling depreciated against the greenback to trade at **KES108.32/\$** in contrast to the **KES 108.29/\$** during the previous session. The shilling has remained under pressure since the mid-March, when the country reported its first case of COVID-19. Foreign investor outflows have increased and CBK has used its forex reserves in a bid to support the shilling. As at August 13th, CBK's usable foreign exchange reserves stood at **USD 9,249 million (5.6months of import cover)**.

MONEY MARKET:

The interbank rate increased to **1.83%** from **1.76%**.

EQUITIES:

Equity turnover at the NSE decreased by **10.65%** to **KES 0.32Bn** from **KES 0.35Bn** recorded in the previous session. The top traders today were KCB, Safaricom and COOP. The counters' turnover stood at **KES 103Mn**, **KES 80Mn** and **KES47Mn** respectively. Foreign investors were net-sellers recording net outflows of **KES 0.02Bn** as compared to net inflows of **KES 0.13Bn** in the previous session. In terms of company specific foreign activity, foreigners were net-sellers on COOP and net-buyers on KCB and Safaricom.

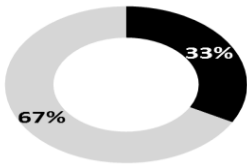
SUMMARY OF MARKET STATISTICS:

KES	Today	Previous	%	Trend	YTD
Equity Turnover	315,410,097	353,010,091	(10.65)	↓	3.83
Total Volume Traded	20,891,300	18,497,714	12.94	↑	95.79
Market Cap (Bn KES)	2,017.07	1,987.21	1.50	↑	(20.59)
Bond Turnover (Bn KES)	2.96	3.41	(13.13)	↓	6,024.95
NSE 20 Share Index	1,738.43	1,743.58	(0.30)	↓	(34.51)
NSE All Share Index	131.40	129.46	1.50	↑	(21.04)
FTSE NSE KENYA 15 Index	156.11	153.88	1.45	↑	(29.46)
FTSE NSE Kenya 25 Index	170.81	170.23	0.34	↑	(25.57)
FTSE NSE KENYA Gov't bond index	97.72	97.73	(0.01)	↓	0.23
Foreign buys (KES)	113,952,945	178,743,425	(36.25)	↓	(53.64)
Foreign Sales (KES)	93,941,635	309,708,916	(69.67)	↓	23.46

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



■ Foreign Investors ■ Local Investors

(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
SCOM	68,134,250
EQTY	38,741,645
KCB	6,200,000
EABL	492,800
NSE	305,100

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
KCB	52,683,300
KNRE	13,964,665
COOP	9,695,950
EQTY	6,954,220
SCOM	5,764,770

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Top Traders (Ksh)	Vol.
KCB	102,736,550
SCOM	79,839,755
COOP	47,023,430
EQTY	46,844,890
KNRE	14,022,130
NCBA	9,093,665
KEGN	4,602,082
NMG	2,877,625
ABSA	2,500,460
WTK	1,179,075
IMH	1,077,130
KUKZ	616,500
EABL	508,200
JUB	442,500
GLD	402,000

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

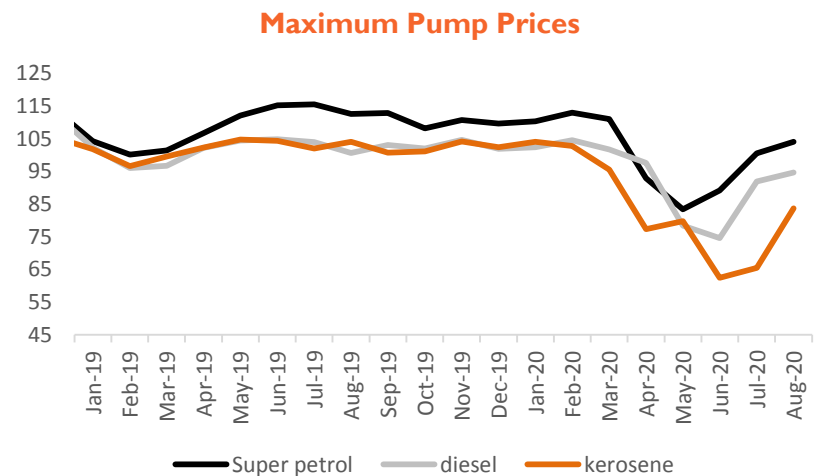
Indicator	17 -Aug-20	14 -Aug-20	13 -Aug-20	12 -Aug-20
NSE 20	1738.43	1743.58	1738.58	1751.39
NASI	131.40	129.46	129.70	130.76
Market Cap (KES Bn)	2017.07	1987.21	1990.89	2007.23
Equity + I Reit turnover (KES Bn)	0.32	0.35	0.20	0.27
Bond Turnover (KES Bn)	2.96	3.41	2.81	2.07

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET:

Secondary bond market turnover was down, decreasing by **13.13%** to **KES2.96Bn** from **KES3.41Bn** worth of bonds traded previously. The number of deals decreased to **90** from **105** in the previous session. The **FXD1/2019/5Yr** was today's most traded bond.

DAY'S FEATURE: Fuel pump prices for the month of August 2020.



Fuel pump prices have now increased across Super petrol, Kerosene and diesel. The price of a litre of super petrol and diesel rose to **KES103.95** and **KES94.63** respectively. Meanwhile, the price of kerosene rose to **KES83.65**. Energy and Petroleum Regulatory Authority (EPRA) in a press statement said that the changes in this month's prices are linked to the recovery in crude oil prices, which increased the cost of imported refined fuel. The increase in the petrol levy to **KES5.40** from **KES0.40**, representing a **1,250%** rise, has also helped to drive pump prices.

Our view: Crude oil prices plunged after fallout between Saudi Arabia and Russia over production cuts in the wake of the global Covid-19 pandemic, which also led to reduced demand for energy on slow economic activities. However, reduced tensions have led to a rally in crude oil prices. We therefore expect fuel pump prices to continue rising before stabilizing.

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
CGEN	2.05	9.74%	23.10	21.05	30.030	1,300	-	-
XPRS	0.37	9.74%	4.17	3.80	417	100	-	-
NBV	0.04	7.14%	0.60	0.56	1,315	2,200	-	-
FAHR	0.32	5.90%	5.74	5.42	35,006	6,100	-	-
EQTY	1.50	5.22%	30.25	28.75	46,844,890	1,548,300	38,741,645	6,954,220
SCOM	0.70	2.53%	28.40	27.70	79,839,755	2,813,300	68,134,250	5,764,770
GLD	40.00	2.03%	2,010.00	1,970.00	402,000	200	-	402,000
CIC	0.04	2.00%	2.04	2.00	170,777	83,900	-	-
CTUM	0.40	1.77%	23.00	22.60	34,500	1,500	-	34,500
ABSA	0.14	1.55%	9.20	9.06	2,500,460	271,800	-	2,014,860
SLAM	0.20	1.48%	13.70	13.50	27,400	2,000	-	-
KCB	0.45	1.47%	31.00	30.55	102,736,550	3,312,500	6,200,000	52,683,300
SBIC	1.00	1.36%	74.50	73.50	111,600	1,500	-	-
BRIT	0.04	0.56%	7.20	7.16	25,168	3,500	-	-
KPLC	0.01	0.53%	1.88	1.87	365,503	194,300	-	37,600
TPSE	0.05	0.35%	14.30	14.25	21,425	1,500	7,075	-
JUB	0.75	0.34%	221.25	220.50	442,500	2,000	-	-
BAT	1.00	0.30%	329.00	328.00	164,500	500	-	-
ARM	-	0.00%	5.55	5.55	-	-	-	-
BKG	-	0.00%	16.00	16.00	1,600	100	-	1,600
BOC	-	0.00%	57.75	57.75	5,775	100	-	-
CARB	-	0.00%	8.16	8.16	-	-	-	-
CRWN	-	0.00%	46.50	46.50	-	-	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
EABL	-	0.00%	154.00	154.00	508,200	3,300	492,800	46,200
EGAD	-	0.00%	10.35	10.35	1,035	100	-	-
HFCK	-	0.00%	4.00	4.00	9,190	2,300	-	-
KAPC	-	0.00%	80.00	80.00	-	-	-	-
KQ	-	0.00%	3.83	3.83	-	-	-	-
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LBTY	-	0.00%	7.22	7.22	-	-	-	-
LIMIT	-	0.00%	385.00	385.00	-	-	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
NBK	-	0.00%	4.12	4.12	-	-	-	-
NSE	-	0.00%	6.78	6.78	376,896	55,600	305,100	-
OCH	-	0.00%	2.45	2.45	-	-	-	-
ORCH	-	0.00%	12.25	12.25	-	-	-	-
PORT	-	0.00%	13.85	13.85	-	-	-	-
SASN	-	0.00%	17.00	17.00	1,700	100	-	-
SMER	-	0.00%	3.50	3.50	3,500	1,000	-	-
TCL	-	0.00%	1.80	1.80	-	-	-	-
TOTL	-	0.00%	22.90	22.90	11,450	500	-	-
UCHM	-	0.00%	0.29	0.29	3,537	12,100	-	-
UNGA	-	0.00%	32.70	32.70	-	-	-	-
NMG	-	0.00%	11.70	11.70	2,877,625	246,300	-	1,150,070
WTK	(0.25)	-0.17%	143.75	144.00	1,179,075	8,200	-	-
BAMB	(0.05)	-0.19%	26.00	26.05	156,130	6,000	-	-
CABL	(0.01)	-0.61%	1.62	1.63	2,101	1,300	-	-
EVRD	(0.01)	-1.01%	0.98	0.99	196	200	-	-
IMH	(0.50)	-1.12%	44.15	44.65	1,077,130	24,400	-	-
SCBK	(1.75)	-1.16%	149.25	151.00	179,000	1,200	-	-
KUKZ	(5.75)	-1.47%	385.25	391.00	616,500	1,600	-	-
KEGN	(0.10)	-1.77%	5.54	5.64	4,602,082	830,600	-	-
KNRE	(0.06)	-2.71%	2.15	2.21	14,022,130	6,518,700	-	13,964,665
FTGH	(0.04)	-2.80%	1.39	1.43	1,670	1,200	-	-
COOP	(0.35)	-3.23%	10.50	10.85	47,023,430	4,477,200	72,075	9,695,950
NCBA	(0.75)	-3.29%	22.05	22.80	9,093,665	412,500	-	1,083,900
DTK	(2.25)	-3.35%	65.00	67.25	13,000	200	-	-
SCAN	(0.38)	-4.94%	7.32	7.70	202,800	27,700	-	108,000
UMME	(0.50)	-6.76%	6.90	7.40	3,450	500	-	-
LKL	(0.36)	-7.35%	4.54	4.90	21,359	4,700	-	-
HAFR	(0.04)	-8.89%	0.41	0.45	5,497	13,300	-	-
SGL	(2.20)	-9.78%	20.30	22.50	2,030	100	-	-

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