



The Market Whispers:

The week opened on dismal activities with volumes plunging to 7.24Mn from 25.47Mn. Turnover shrunk to KES 201.36Mn from KES 846.83. The market was balanced, slightly skewed to foreign activity with a 56.75% participation and a net inflow of KES 9.01Mn boosted by a 14.24Mn and KES 8.38Mn foreign buying in Scangroup and Centum Investments Limited.

The NSE 20 Share Index lost a marginal 0.08% to stand at 3,623.76 points. NSE 25 Share Index dipped 0.13% to 4,116.47 points. NASI was down 0.73 points to 158.52 points while market capitalization was at KES 2,322.52Bn from KES 2,333.21Bn.

Kengen saw an upward price movement, to average at KES 8.75 (+0.57%) on 0.20Mn trades. The price is set to continue with the current trend as we approach the FY-17 release on 18th Oct-17. Kenol Kobil inched 2.41% higher to KES 14.85 with a total of 34,300 shares exchanging. On the opposite side, Umeme, Total and Kenya Power lost 3.46%, 3.19% and 0.51% respectively.

Banking sector saw I&M and DTB advance 2.46% and 0.56% to KES 125.00 and KES 180.00 respectively. KCB, Equity and Cooperative Bank were the top sector movers with 1.51Mn, 0.94Mn and 0.66Mn shares with the three trading at flat levels of KES 37.00, KES 36.00 and KES 16.50.

Bonds:

Bond Market saw 63 deals with a value of KES 1.52Bn, a 92.25% increase from KES 0.81Bn on 36 deals seen at the end of last week.

Company Statistics

Counter	Today's Price	Price Change	Volume ('000)	Turnover (Mn)	Closing DD '000'	Closing SS'000'	Div. Yield	Trailing P/E
ARM	13.00	0.0%	154.00	2.00	2.50	3.80	0.0%	-
Bamburi	179.00	0.0%	-	-	0.50	56.20	6.7%	12.95
Barclays Bank	9.45	-0.5%	196.70	1.86	2.20	30.00	10.6%	7.44
BAT	800.00	-0.9%	18.50	14.80	1.00	6.60	5.4%	17.93
BRITAM	14.15	0.4%	65.30	0.92	0.20	2.70	2.1%	7.53
Centum	39.75	0.6%	216.00	8.59	0.10	29.90	3.0%	3.38
CIC Insurance	5.30	-0.9%	219.30	1.16	0.10	24.10	2.0%	40.77
Co-op Bank	16.50	0.0%	659.60	10.88	554.00	19.00	4.8%	5.73
EABL	241.00	0.0%	0.80	0.19	0.10	25.90	3.1%	19.75
Equity group	36.00	0.0%	943.10	33.95	2.00	9.70	5.6%	6.10
Housing Finance	10.75	-0.5%	0.80	0.01	7.90	8.80	4.7%	2.59
KCB	37.00	0.0%	1,505.80	55.71	4.10	34.90	8.1%	5.43
National Bank	10.00	0.0%	26.40	0.26	12.50	4.80	0.0%	-
KenGen	8.75	0.6%	202.60	1.77	1.20	68.80	0.0%	5.00
KenolKobil	14.85	2.4%	34.30	0.51	0.30	216.50	3.0%	10.84
Kenya Airways	4.70	1.1%	5.50	0.03	18.70	0.10	0.0%	-
Kenya Re	19.65	-0.3%	10.30	0.20	40.50	6.80	4.1%	3.79
KPLC	9.70	-0.5%	111.80	1.08	19.80	0.20	5.2%	2.55
Mumias Sugar	1.05	0.0%	2.50	0.00	194.50	152.10	0.0%	-
NSE	18.90	-0.5%	75.90	1.43	0.10	24.70	1.4%	55.59
NIC Bank	36.00	-0.7%	11.00	0.40	0.10	11.20	3.5%	5.14
Safaricom	24.75	-1.0%	951.30	23.54	10.80	2.10	3.1%	26.05
Stanbic	79.00	-0.6%	11.80	0.93	6.30	1.60	6.6%	6.44
Uchumi	3.15	-7.4%	59.30	0.19	2.50	-	0.0%	2.30
WPP Scangroup	18.00	0.3%	793.20	14.28	0.10	0.20	0.0%	12.00

KEY NSE MARKET INDICATORS

Indicator	13-Oct-17	16-Oct-17	%Δ
NSE 20 Share Index	3,626.62	3,623.76	0.08
NSE 25 Share Index	4,121.96	4,116.47	0.13
NASI	159.25	158.52	0.46
FTSE 15	195.47	195.45	0.02
FTSE 25	200.86	200.23	0.31
Turnover Ksh' Mn	846.83	201.36	76.22
Shares Traded 'Mn	25.47	7.24	71.52
Bonds	0.81	1.56	92.25
Mkt. Cap Ksh' Bn	2,333.21	2,322.52	0.46

NSE-20 Share	Level	Points	%Δ
1DY	3,626.62	-2.86	0.08
WTD	3,712.37	-88.61	2.39
MTD	3,783.97	-160.21	4.23
YTD	3,206.24	417.52	13.02
1 YR	3,267.92	355.84	10.89

TOP GAINERS

Counter	Price	%Δ	Counter	Price	%Δ
EXPRESS	4.00	6.67	UCHUMI	3.15	7.35
C&G	20.00	3.36	UNGA	30.00	4.76
I&M	125.00	2.46	SAMEER	2.50	3.85

STOCK MARKET MOVERS

Counter	Price	Volumes	Turnover (Mn)55.78	Foreign Activity (%)
KCB	37.00	1.51	55.78	91.86
EQTY	36.00	0.94	33.96	52.29
EABL	241.00	0.12	287.53	79.84

Foreign Activity (Value in Mn)

Counter	Buys	%	Counter	Sell	%
KCB	47.81	42.85	KCB	54.67	49.01
EABL	28.12	48.91	EQTY	27.81	40.96
SCAN	14.24	49.88	EABL	17.79	30.93
Others	28.58		Others	9.47	
Total	118.75		Total	109.74	

STERLING CAPITAL SECTOR INDICES

Segment	13-Oct-17	16-Oct-17	%Δ
Banking	82.80	82.85	0.06
Manufacturing	104.93	104.04	0.85
Telecommunication	284.14	281.30	1.00
Energy & Petroleum	72.88	72.26	0.86
Insurance	105.72	105.65	0.06
Construction	43.79	43.79	0.00

FIXED INCOME MARKET STATISTICS

Benchmark	Rate %	Δ bps	Subscription (%)
91-Days	8.097	13.20bps	63.36
182-Days	10.316	10.30bps	43.55
364-Days	10.989	11.40bps	33.67

SHILLING AGAINST WORLD MAJOR CURRENCIES

Currency	13-Oct-17	16-Oct-17	%Δ
Ksh/\$	103.28	103.28	0.00
Ksh/£	135.84	137.56	1.27
Ksh/€	122.35	122.56	0.17

Source: CBK, NSE, SCL

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