

Weekly Market Report

Week – 18(27th April 2020-30th April 2020)



Key Market Indicators

Key Indicators (Weekly)	24-Apr-20	30-Apr-20	Δ (%)
NSE20 Share Index	1,967.84	1,958.07	0.5
NSE25 Share Index	3,175.45	3,292.64	3.7
NSE All Share Index	135.78	139.69	2.9
Equity Turnover(KshBn)	4.27	1.60	-62.5
Volume traded (Mn)	134.16	68.85	-48.7
Bonds Traded (KES Bn)	8.48	6.67	-21.3
Mkt. Cap. (Ksh Billion)	2,075.20	2,135.01	2.9
Mkt. Cap. (US\$ Billions)	18.35	19.90	8.4

Top Gainer Stocks

Stock	24-Apr-20	30-Apr-20	Δ (%)
EABL	152.00	172.75	13.7
SAMEER	2.11	2.37	12.3
KAKUZI	310.00	341.00	10.0
EQTY	34.60	37.65	8.8
CENTUM	23.49	25.15	7.5

Top Loser Stocks

Stock	24-Apr-20	30-Apr-20	Δ (%)
LIMURU TEA	475.00	427.50	10.0
UCHUMI	0.30	0.27	10.0
NATION	23.55	21.35	9.3
EVEREADY	0.87	0.80	8.1
KENGEN	4.90	4.55	7.1

Top Movers

Counter	Price for the day (Ksh)	Vol for the week 'Mn'	Value for the week (Ksh 'Mn')
SCOM	28.50	25.37	723.05
EQTY	37.65	10.71	403.37
KCB	37.00	5.39	199.39
EABL	172.75	0.30	51.27
COOP	12.60	2.11	26.60

Foreign Trades - (27-Apr-2020- 30-Apr-2020)

Day	BUYS(Ksh 'Mn')	SALES(Ksh 'Mn')	NET(Ksh 'Mn')
Monday	117.60	403.39	-285.78
Tuesday	182.65	310.37	-127.71
Wednesday	97.12	163.12	-66.00
Thursday	167.39	320.22	-152.83
Friday	0.0	0.0	0.0
Total	564.77	1,197.09	-632.33

Market Statistics (Values in 'Mn') -27-Apr- 2020- 30-Apr- 2020)

Day	Turnover (Mn)	Foreign Buys %	Foreign Sales %	Vol(Mn)
Monday	477.17	12.3	42.3	17.29
Tuesday	381.17	24.0	40.7	15.23
Wednesday	322.64	15.1	25.3	16.71
Thursday	423.85	19.8	37.8	19.75
Friday	0.0	0.0	0.0	0.0
Total	1,604.83	17.8	36.5	68.99

Average Interbank Rates

Date	Value (KshBn)	Ave. Interbank Rate (%)
17-Apr-20-23-Apr-2020	6.4	5.8
24-Apr-2020	12.9	4.9
27-Apr-2020	6.8	4.6
28-Apr-2020	18.0	4.6
29-Apr-2020	13.5	4.7
30-Apr-2020	10.2	4.7
24Apr-20-30-Apr-2020	12.3	4.7

Currency	24-Apr-20	30-Apr-20	Δ %
US Dollar	107.24	107.29	0.0
STG Pound	132.45	133.09	0.5
EURO	115.63	116.42	0.7
Japanese Yen	99.82	100.71	0.9
SA Rand	5.64	5.91	4.8
KES/USHS	35.37	35.46	0.3
KES/TSHS	21.57	21.57	0.0
KES/RWF	8.78	8.88	1.1

Weekly Statistics

	This Week	Δ% W/W	Price Δ% YTD	20 Day Avg	Turnover (KES)	P/E	Trailing P/E	Div Yield (%)
Agricultural								
Eaagads	10.00	0.0%	-1.0%	10.0	0.0	-	17.9	0.0%
Kakuzi	341.00	10.0%	0.3%	311.5	0.1	12.7	12.7	2.6%
Kapchorua Tea	66.50	0.0%	-16.9%	66.5	-	-	2.2	15.0%
Limuru Tea	427.50	-10.0%	-5.0%	470.3	0.1	336.6	227.4	0.2%
Sosini	17.00	-5.3%	-0.3%	17.0	0.5	3.8	2.3	6.2%
Williamson Tea	115.00	2.4%	-17.3%	112.0	3.7	-	2.9	17.4%
Automobiles								
Car & General	23.50	0.0%	-9.6%	23.5	0.0	30.9	17.0	3.4%
Banking								
Barclays Bank	10.60	0.0%	-20.6%	10.6	40.5	7.8	8.3	10.4%
Diamond Trust	83.00	-2.9%	-25.2%	34.6	86.5	3.5	3.4	3.1%
Equity Bank	37.65	8.8%	-30.6%	34.6	4.0	7.2	5.6	5.3%
Housing Finance	3.89	-4.0%	-38.6%	4.1	403.4	-	-	0.0%
I&M Holdings	51.25	0.0%	-5.1%	51.3	0.3	3.2	2.9	7.6%
KCB	37.00	1.1%	-31.8%	36.6	199.4	4.7	5.4	9.5%
National Bank	4.12	0.0%	0.0%	3.8	-	199.2	-	0.0%
NIC Bank	28.50	-0.9%	-22.7%	28.7	11.2	4.3	4.1	4.4%
Stanbic Holdings	92.50	-2.6%	-15.3%	95.0	4.5	5.8	5.5	6.3%
StanChart	187.50	-3.0%	-6.3%	193.3	7.0	8.0	9.4	10.1%
Co-op Bank	12.60	3.7%	-22.9%	12.1	26.6	5.8	5.2	7.9%
Commercial								
Atlas Development	-	-	-	-	-	-	-	-
Deacons E A	0.80	0.0%	0.0%	0.5	-	-	-	0.0%
Eveready	6.00	-8.0%	-26.6%	0.9	0.0	0.3	0.3	0.0%
Express	0.89	3.4%	-12.3%	5.8	0.0	-	-	0.0%
Kenya Airways	5.02	-4.3%	-57.4%	0.9	3.5	-	-	0.0%
Longhorn Kenya	0.60	2.4%	-26.4%	4.9	0.1	7.6	7.6	10.4%
Nairobi Business V.	21.35	0.0%	-14.3%	0.6	0.0	0.3	0.3	0.0%
Nation Media	2.37	-9.3%	-46.3%	23.6	6.4	1.8	1.9	23.4%
Sameer Africa	20.00	12.3%	-31.3%	2.1	0.1	-	-	0.0%
Standard Group	14.50	0.0%	-27.4%	20.0	0.0	9.3	8.6	0.0%
TPS EA	0.27	-3.3%	-17.4%	15.0	0.2	8.9	-	2.4%
Uchumi	16.00	-10.0%	-6.9%	0.3	0.0	-	0.2	0.0%
WPP Scangroup	16.00	-0.3%	-10.6%	16.1	0.6	14.3	10.7	2.4%
Construction								
Kenya Cement	5.55	0.0%	0.9%	48.0	-	-	-	0.0%
Symbio Cement	45.10	-6.0%	-43.6%	53.0	1.2	3.1	3.3	9.1%
Crown Berger	53.00	0.0%	-15.2%	1.9	0.0	81.5	61.6	1.1%
E.A.Cables	1.85	-0.5%	-27.5%	14.3	0.0	-	-	0.0%
E.A.Portland	14.25	0.0%	-1.7%	-	-	0.3	0.2	0.0%
Energy								
KenGen	4.55	-7.1%	-21.6%	22.0	11.9	3.3	4.2	8.8%
Kenekobil	22.00	0.0%	0.0%	2.1	-	13.4	16.1	0.0%
KPLC	2.01	-6.1%	-33.7%	23.6	11.9	0.5	0.5	0.0%
Total Kenya	24.10	1.9%	-14.2%	6.9	1.2	9.4	8.4	5.4%
Umeme Ltd	6.90	0.3%	-16.7%	-	0.4	3.4	3.9	8.0%
Insurance								
BRITAM	6.84	2.1%	-25.5%	2.2	5.9	-	-	0.0%
CIC	2.26	4.1%	-19.6%	271.3	0.1	32.3	17.4	5.8%
Jubilee	263.00	-3.0%	-24.9%	2.6	21.6	6.1	6.0	3.4%
Kenya Re	2.52	-3.1%	-16.8%	8.2	1.1	0.5	0.5	17.9%
Liberty Kenya	8.34	1.7%	-20.2%	15.0	0.0	7.1	7.9	0.0%
Sanlam	15.00	0.0%	-16.7%	-	0.0	23.8	-	0.0%
Investments								
Centum	25.15	7.5%	-15.0%	0.4	7.6	2.3	2.1	0.0%
Home Afrika	0.38	-2.6%	-30.9%	1,500.0	0.1	-	-	0.0%
Kurwitu	1,500.00	0.0%	0.0%	2.3	-	-	-	0.0%
Olympia Capital	2.32	0.9%	15.4%	1.7	0.0	8.9	8.9	0.0%
TransCentury	1.70	1.2%	-32.0%	-	0.0	-	42.5	0.0%
Investment Service								
NSE	9.26	3.1%	-26.2%	-	0.7	13.0	27.2	3.1%
Manufacturing								
BOC	71.00	2.9%	22.4%	338.5	1.2	9.3	9.1	7.3%
BAT	320.00	-5.5%	-33.1%	8.9	7.5	7.5	7.2	10.9%
Carbacid	9.26	4.0%	13.2%	152.6	0.1	6.3	6.0	7.6%
EABL	172.75	13.7%	-11.9%	1.0	51.3	14.2	14.2	4.9%
Flame Tree	0.91	-6.2%	-60.4%	12.3	1.5	0.7	0.9	0.0%
Kenya Orchards	12.25	0.0%	-2.0%	0.3	-	37.1	40.8	0.0%
Mumias Sugar	0.27	0.0%	0.0%	29.0	-	-	-	0.0%
Unga Group	29.20	0.7%	-14.1%	-	0.0	6.8	7.8	1.7%
telecommunication								
Safaricom	28.50	3.4%	-8.9%	27.6	723.1	18.0	18.0	4.4%

Source: Nairobi Securities Exchange & Central Bank of Kenya



Market Watch:



Weekly Equity Turnover



Weekly Bond Turnover

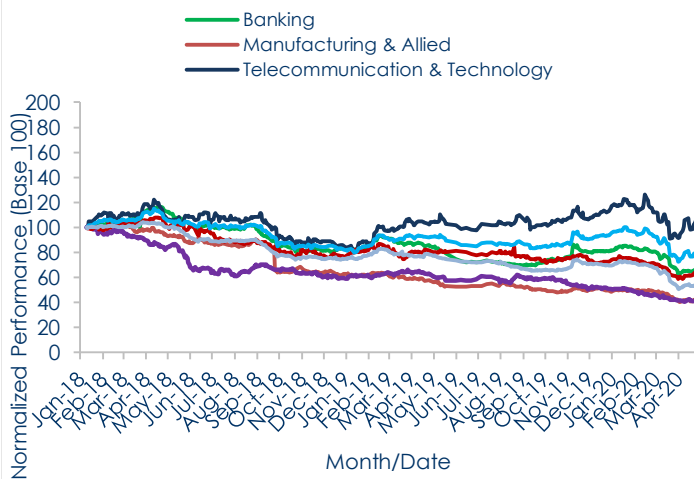


Sector Performances

Segment	24-Apr-20	30-Apr-20	Week/Week	YTD (%)
Banking	66.00	65.96	0.1	2.64
Manufacturing	41.61	42.04	1.0	15.9
Telecommunication	102.99	106.54	3.5	9.0
Energy & Petroleum	63.73	62.29	2.1	2.3
Insurance	41.18	41.29	0.3	20.9
Construction	41.66	41.10	1.4	19.4
Commercial	32.04	31.52	1.6	25.0
Agricultural	62.64	62.22	0.7	6.4
Automobile	92.89	92.89	0.0	9.6
Investment	50.24	50.92	1.3	14.4
NSE 20	1,967.84	1,958.07	0.5	26.8
NASI	135.78	139.69	3.7	19.7

Source: Nairobi Securities Exchange & Sterling Capital Research

Sector Performance



Source: Nairobi Securities Exchange

Debt Market:

1) Treasury Bills Auction Results

Treasury Bill	Amount Offered (KES.Bn)	Bids Received (KES.Bn)	Amount Accepted (KES.Bn)	Performance Rate (%)
91-Day	4.0	4.4	2.5	111.82
182-Day	10.0	2.7	2.5	26.75
364-Day	10.0	10.8	10.6	107.51
Total	24.0	17.9	15.7	74.58

Source: Central Bank of Kenya

Treasury Bill	Yield (%) Week 17	Yield (%) Week 18	Δ from previous auction
91-Day	7.212	7.242	0.030
182-Day	8.121	8.134	0.013
364-Day	9.110	9.115	0.005

Source: Central Bank of Kenya

2) Key Rates

Key Rates	(%)	Date
CBK Rate	7.00	29-Apr-20
Interbank Rate	4.27	30-Apr-20
CBK Discount Window	13.00	29-Apr-20
REPO	6.90	16-Aug-19
Horizontal REPO	11.50	02-Sep-14
Inflation	5.62	April-20

Source: Central Bank of Kenya & Kenya National Bureau of Statistics

Company Announcements

Company	Announcement	Book Closure Date	Payment Date
FAHR	First & Final Dividend KES.075	Subject to approval	31/05/2020
SAFARICOM	First & Final Dividend KES.1.40	31/Jul/2020	01/11/2020
NCBA	Bonus issue 1:10	Subject to approval	Subject to Approval
NATION	Bonus issue 1:10	12-June 2020	Subject to Approval
BRITAM	First & Final dividend	Subject to approval	Subject to approval
NSE	First & Final dividend KES.0.08	Subject to approval	Subject to approval
Kenya-Re	Final dividend KES.0.10	12/06/2020	24/06/2020
I & M	Final dividend KES.2.55	Subject to approval	Subject to approval
ABSA	Final dividend KES.0.90	Subject to approval	Subject to approval
STANBIC	Final dividend KES.5.80	18/05/2020	Subject to approval
BK GROUP	Final dividend KES.14.40	12/06/2020	01/07/2020
EQUITY	Final dividend KES.2.50	12/06/2020	24/07/2020
KAKUZI	Final dividend KES.14.00	19/06/2020	15/07/2020
DTK	Final Dividend KES.2.70	25/06/2020	24/07/2020

Source: Nairobi Securities Exchange