

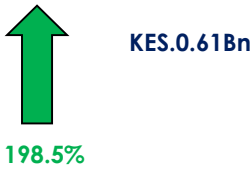
## MARKET COMMENTARY

Tuesday, 22<sup>nd</sup> September 2020

### Indices



### Equity Turnover



### Bonds Turnover



### Company Statistics

Counter	Price (KES)	Price Δ	Volume	Turnover (KES.000)	Dividend (KES)	Div. Yield	Trailing P/E
ABSA Group	9.84	0.0%	144,700	1,423.8	1.1	11.2%	7.2
Bamburi	23.80	-1.0%	19,800	471.2	1.0	0.0%	4.4
BAT	340.00	2.3%	8,000	2,720.0	35.0	10.3%	8.3
BRITAM	7.18	-1.1%	105,900	760.4	-	0.0%	5.1
Centum	20.85	0.7%	115,100	2,399.8	1.2	5.8%	1.7
Co-op Bank	11.95	0.4%	63,000	752.9	1.0	8.4%	4.9
DTB	61.00	-2.8%	162,600	9,918.6	2.7	4.4%	2.5
EABL	160.50	-0.6%	599,900	96,284.0	8.5	5.3%	17.5
Equity group	36.00	0.0%	2,417,800	87,040.8	2.5	6.9%	6.1
Housing	4.13	0.0%	16,700	69.0	-	0.0%	-
I&M	44.00	-1.3%	43,800	1,927.2	2.6	5.8%	3.5
Jubilee	220.00	0.5%	2,500	550.0	8.0	3.6%	3.8
KCB	38.00	0.0%	1,451,500	55,157.0	3.3	8.8%	5.1
KenGen	5.02	-6.3%	4,657,100	23,378.6	0.4	8.0%	4.2
Kenya Airways	3.83	0.0%	-	-	-	0.0%	0.5
Kenya Re	2.31	1.8%	1,824,400	4,214.4	0.5	19.5%	0.7
KPLC	1.79	-0.6%	589,900	1,055.9	-	0.0%	0.5
Nation	18.05	5.6%	62,600	1,129.9	5.0	27.7%	1.5
NCBA	22.85	-1.3%	171,200	3,911.9	1.8	7.7%	2.6
NSE	8.22	-3.7%	11,300	92.9	0.5	6.0%	26.6
Safaricom	30.05	0.5%	9,994,800	300,343.7	1.4	4.7%	33.8
Sasini	19.45	-0.3%	1,100	21.4	0.5	2.6%	14.0
Stanbic	75.00	0.0%	6,500	487.5	7.1	9.4%	4.6
Standard	18.60	0.0%	-	-	0.6	3.2%	5.8
Total	24.40	3.2%	700	17.1	1.3	5.3%	2.7
Transcentury	1.63	-1.8%	900	1.5	-	0.0%	-

### KEY NSE MARKET INDICATORS

Indicator	21-Sep-20	22-Sep-20	%Δ
NSE 20 Share Index	1,848.74	1,839.96	0.5
NSE 25 Share Index	3,219.29	3,219.35	0.002
NASI	139.54	173.79	0.2
FTSE 15	173.65	173.79	0.1
FTSE 25	185.68	186.65	0.5
Turnover KES' Bn	0.20	0.61	198.5
Shares Traded 'Mn	8.38	23.73	183.0
Bonds KES' Bn	2.11	3.05	44.0
Mkt. Cap KES' Bn	2,142.31	2,145.81	0.2

NSE-20 SHARE	LEVELS	POINTS	%Δ
1DAY	1,848.74	-8.78	0.5
WTD	1,877.80	-37.84	2.0
MTD	1,723.96	116.00	6.7
YTD	2,673.94	-833.98	31.2
1YR	2,442.50	-602.54	24.7

TOP GAINERS			TOP LOSERS		
Counter	Price	%Δ	Counter	Price	%Δ
TPSE	16.65	6.7	ORCHARD	11.05	9.8
UMEME	7.28	5.8	FAHARI	5.04	7.0
NMG	18.05	5.6	HAFR	0.41	6.8
TOTAL	24.40	3.2	UCHUMI	0.29	6.5
BAT	340.0	2.3	KENGEN	5.02	6.3

### TOP MOVERS

CounterS	Price	Volumes (Mn)	Turnover (Mn)	Foreign Activity (%)
SCOM	30.05	9.99	300.40	90.6
EABL	160.50	0.60	96.30	67.0
EQTY	36.00	2.42	87.04	69.9

### FOREIGN INVESTOR ACTIVITY

Counter	Buys (Mn)	% of Total Turnover	Counter	Sell (Mn)	% of Total Turnover
SCOM	299.41	99.7	SCOM	244.73	81.5
EQTY	36.00	41.4	EABL	96.04	99.7
EABL	33.10	34.4	EQTY	85.67	98.4
Others	38.68		Others	89.91	
<b>Total</b>	<b>407.19</b>		<b>Total</b>	<b>516.35</b>	

### STERLING CAPITAL SECTOR INDICES

Segment	21-Sep-20	22-Sep-20	%Δ
Banking	59.57	59.17	0.7
Manufacturing	42.10	41.77	0.8
Telecommunications	111.78	112.34	0.5
Energy & Petroleum	62.68	62.89	0.3
Insurance	37.32	37.23	0.2
Construction	35.78	35.55	0.7

### FIXED INCOME MARKET STATISTICS

Benchmark	Previous Auction	Rate %	Δ bps
91-Day	6.267	6.273	0.6
182-Day	6.689	6.720	0.3
364-Day	7.564	7.571	0.7

### CURRENCY WATCH

Currency	21-Sep-20	22-Sep-20	%Δ
\$/KES	108.40	108.36	0.04
£/KES	140.44	139.38	0.8
€/KES	128.40	127.79	0.5

Source: Nairobi Securities Exchange, Central Bank of Kenya, Sterling Capital Research

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