



Key Market Indicators

| Key Indicators (Weekly) | 25-Sep-20 | 02-Oct-20 | Δ (%) |
|--------------------------|-----------|-----------|-------|
| NSE20 Share Index | 1,847.63 | 1852.17 | 0.18 |
| NSE25 Share Index | 3,242.38 | 3242.54 | 0.19 |
| NSE All Share Index | 140.37 | 140.22 | 0.24 |
| Equity Turnover(KshBn) | 3.44 | 1.52 | 55.81 |
| Volume Traded (Mn) | 122.14 | 67.65 | 44.61 |
| Bonds Traded (KES Bn) | 12.23 | 16.13 | 31.89 |
| Mkt. Cap. (Ksh Billion) | 2,155.04 | 2152.80 | 0.10 |
| Mkt. Cap. (US\$Billions) | 19.87 | 19.84 | 0.15 |

Top Gainer Stocks

| Stock | 25-Sep-20 | 02-Oct-20 | Δ (%) |
|---------|-----------|-----------|-------|
| JUBILEE | 220.00 | 291.75 | 32.61 |
| NBV | 0.60 | 0.66 | 10.00 |
| BKG | 13.50 | 14.60 | 8.15 |
| CIC | 2.07 | 2.18 | 5.80 |
| STANBIC | 76.00 | 80.00 | 5.26 |

Top Loser Stocks

| Stock | 25-Sep-20 | 02-Oct-20 | Δ (%) |
|-----------|-----------|-----------|-------|
| SAMEER | 4.04 | 3.47 | 14.11 |
| TPSE | 16.65 | 15.00 | 9.91 |
| SASINI | 20.00 | 18.30 | 8.50 |
| FLAMETREE | 1.40 | 1.29 | 7.86 |
| CROWN | 46.50 | 43.00 | 7.53 |

Top Movers

| Counter | Price for the day (Ksh) | Vol for the week 'Mn' | Value for the week (Ksh 'Mn') |
|---------|-------------------------|-----------------------|-------------------------------|
| SCOM | 30.00 | 29.11 | 873.21 |
| EQTY | 35.95 | 3.54 | 127.47 |
| EABL | 161.25 | 0.75 | 120.23 |
| KCB | 38.50 | 2.38 | 91.71 |
| BRITAM | 7.42 | 2.90 | 58.03 |

Foreign Trades - (28-Sep-2020- 02-Oct-2020)

| Day | BUYS(Ksh 'Mn') | SALES(Ksh 'Mn') | NET(Ksh 'Mn') |
|--------------|----------------|-----------------|---------------|
| Monday | 186.17 | 243.46 | (57.29) |
| Tuesday | 38.83 | 155.38 | (116.54) |
| Wednesday | 550.54 | 595.89 | (45.35) |
| Thursday | 88.28 | 103.31 | (15.02) |
| Friday | 131.49 | 196.37 | (64.88) |
| Total | 995.31 | 1,294.40 | 202.89 |

Market Statistics (Values in 'Mn') -28-Sep-2020 – 02-Oct-2020

| Day | Turnover (Mn) | Foreign Buys % | Foreign Sales % | Vol(Mn) |
|--------------|-----------------|----------------|-----------------|--------------|
| Monday | 307.05 | 30.31 | 39.64 | 14.83 |
| Tuesday | 182.74 | 10.63 | 42.51 | 9.06 |
| Wednesday | 652.49 | 42.19 | 45.66 | 25.50 |
| Thursday | 145.39 | 30.36 | 35.53 | 8.79 |
| Friday | 237.44 | 27.69 | 41.35 | 9.90 |
| Total | 1,525.12 | 30.31 | 39.64 | 43.23 |

Average Interbank Rates

| Date | Ave. Value (KshBn) | Ave. Interbank Rate (%) |
|--------------------------------|--------------------|-------------------------|
| 18-Sep-20 - 24-Sep-2020 | 14.6 | 3.1 |
| 25-Sep-2020 | 4.5 | 3.4 |
| 28-Sep-2020 | 6.5 | 3.5 |
| 29-Sep-2020 | 11.5 | 3.6 |
| 30-Sep-2020 | 11.1 | 3.8 |
| 01-Oct-2020 | 9.9 | 3.6 |
| 25-Sep-20 - 01-Oct-2020 | 8.7 | 3.6 |

| Currency | 25-Sep-20 | 02-Oct-20 | Δ % |
|--------------|-----------|-----------|------|
| US Dollar | 108.45 | 108.49 | 0.04 |
| STG Pound | 138.38 | 140.25 | 1.35 |
| EURO | 126.49 | 127.41 | 0.72 |
| Japanese Yen | 102.84 | 102.70 | 0.14 |
| SA Rand | 6.37 | 6.50 | 2.04 |
| KES/USHS | 34.14 | 34.20 | 0.18 |
| KES/TSHS | 21.39 | 21.39 | 0.00 |
| KES/RWF | 8.94 | 8.99 | 0.56 |

Weekly Statistics

| | This Week | Δ% W/W | Price Δ% YTD | 20 Day Avg | Turnover (KES) | P/E | Trailing P/E | Div Yield (%) |
|---------------------------|-----------|--------|--------------|------------|----------------|-------|--------------|---------------|
| Agricultural | | | | | | | | |
| Eaagads | 13.15 | 0.0% | 30.2% | 13.2 | 0.0 | - | 23.5 | 0.0% |
| Kakuzi | 385.00 | 0.0% | 13.2% | 385.0 | - | 14.3 | 14.3 | 2.3% |
| Kapchorua Tea | 81.50 | 0.0% | 1.9% | 81.5 | - | - | 2.7 | 12.3% |
| Limuru Tea | 400.00 | 0.0% | -11.1% | 400.0 | - | 315.0 | 212.8 | 0.3% |
| Sasini | 20.00 | -8.5% | 13.3% | 20.0 | 0.4 | 4.3 | 2.7 | 5.5% |
| Williamson Tea | 130.00 | 2.0% | -6.5% | 127.5 | 1.7 | - | 3.2 | 15.4% |
| Automobiles | | | | | | | | |
| Car & General | 22.30 | -0.4% | -14.2% | 22.4 | 0.0 | 29.3 | 16.2 | 3.6% |
| Banking | | | | | | | | |
| Absa Bank | 9.80 | -2.0% | -26.6% | 10.0 | 40.8 | 7.2 | 7.7 | 11.2% |
| Diamond Trust | 61.25 | 2.1% | -44.8% | 36.1 | 45.4 | 2.6 | 2.5 | 4.2% |
| Equity Bank | 35.95 | -0.4% | -33.7% | 36.1 | 21.8 | 6.9 | 5.3 | 5.6% |
| Housing Finance | 3.99 | -0.5% | -37.1% | 4.0 | 127.5 | - | - | 0.0% |
| I&M Holdings | 43.55 | -1.9% | -19.4% | 44.4 | 3.3 | 2.7 | 2.5 | 9.0% |
| KCB | 38.50 | -1.0% | -29.0% | 38.9 | 91.7 | 4.9 | 5.6 | 9.1% |
| National Bank | 4.12 | 0.0% | 0.0% | 3.8 | - | 199.2 | - | 0.0% |
| NCBA | 22.65 | -1.7% | -38.5% | 23.1 | 8.0 | 3.4 | 3.2 | 5.5% |
| Stanbic Holdings | 80.00 | 5.3% | -26.8% | 76.0 | 17.7 | 5.0 | 4.7 | 7.3% |
| StanChart | 161.00 | 0.8% | -19.5% | 159.7 | 4.4 | 6.8 | 8.1 | 11.8% |
| Co-op Bank | 11.70 | -1.7% | -28.4% | 11.9 | 32.3 | 5.4 | 4.9 | 8.5% |
| Commercial | | | | | | | | |
| Atlas Development | - | - | - | - | - | - | - | - |
| Deacons E A | 0.45 | 0.0% | 0.0% | 0.5 | - | - | - | 0.0% |
| Eveready | 0.97 | -2.0% | -11.0% | 1.0 | 0.0 | 0.3 | 0.4 | 0.0% |
| Express | 4.32 | 0.0% | -36.8% | 4.3 | - | - | - | 0.0% |
| Kenya Airways | 3.83 | 0.0% | 83.3% | 3.8 | - | - | - | 0.0% |
| Longhorn Kenya | 4.51 | -5.5% | -33.9% | 4.8 | 0.5 | 6.8 | 6.8 | 11.5% |
| Nairobi Business V. | 0.66 | 10.0% | -5.7% | 0.6 | 0.0 | 0.3 | 0.3 | 0.0% |
| Nation Media | 17.55 | 1.2% | -55.8% | 17.4 | 2.0 | 1.5 | 1.6 | 28.5% |
| Sameer Africa | 3.47 | -14.1% | 0.6% | 4.0 | 0.0 | - | - | 0.0% |
| Standard Group | 18.65 | 0.3% | -32.3% | 18.6 | 0.0 | 8.7 | 8.0 | 0.0% |
| TPS EA | 16.65 | -9.9% | -14.5% | 16.6 | 4.8 | 9.2 | - | 2.3% |
| Uchumi | 0.30 | 0.0% | 3.4% | 0.3 | 0.2 | - | 0.2 | 0.0% |
| WPP Scangroup | 7.50 | 3.3% | -58.1% | 7.3 | 6.3 | 6.7 | 5.0 | 2.3% |
| Construction | | | | | | | | |
| ARM | 5.55 | 0.0% | 0.9% | 24.0 | - | - | - | 0.0% |
| Bamburi Cement | 23.95 | -0.2% | -70.1% | 46.5 | 7.3 | 1.7 | 1.7 | 17.1% |
| Crown Berger | 43.00 | -7.5% | -31.2% | 1.5 | 0.0 | 66.2 | 50.0 | 1.4% |
| E.A.Cables | 1.45 | -5.2% | -43.1% | 14.9 | 0.8 | - | - | 0.0% |
| E.A.Portland | 14.85 | 0.0% | 2.4% | - | - | 0.3 | 0.2 | 0.0% |
| Energy | | | | | | | | |
| KenGen | 5.08 | 0.4% | -12.4% | 22.0 | 15.0 | 3.7 | 4.7 | 7.9% |
| Kenolkobil | 22.00 | 0.0% | 0.0% | 1.8 | - | 13.4 | 16.1 | 0.0% |
| KPLC | 1.75 | -2.8% | -42.2% | 23.7 | 6.5 | 0.5 | 0.5 | 0.0% |
| Total Kenya | 23.50 | -1.1% | -16.4% | 7.3 | 0.1 | 9.1 | 8.2 | 5.5% |
| Umeme Ltd | 7.18 | -2.2% | -13.3% | - | 0.1 | 3.5 | 4.0 | 7.7% |
| Insurance | | | | | | | | |
| BRITAM | 7.42 | 2.5% | -19.2% | 2.1 | 58.0 | - | - | 0.0% |
| CIC | 2.19 | 5.8% | -22.1% | 220.0 | 0.2 | 31.3 | 16.8 | 5.9% |
| Jubilee | 291.75 | 32.6% | -16.6% | 2.3 | 46.8 | 6.8 | 6.6 | 3.1% |
| Kenya Re | 2.40 | 3.0% | -20.8% | 7.8 | 12.3 | 0.5 | 0.5 | 18.8% |
| Liberty Kenya | 7.62 | -2.1% | -27.1% | 12.9 | 0.0 | 6.5 | 7.3 | 0.0% |
| Sanlam | 12.50 | -4.6% | -30.6% | - | 0.0 | 19.8 | - | 0.0% |
| Investments | | | | | | | | |
| Centum | 20.00 | -2.9% | -32.4% | 0.4 | 17.0 | 1.8 | 1.7 | 0.0% |
| Home Afrika | 0.41 | -6.8% | -25.5% | 1,500.0 | 0.0 | - | - | 0.0% |
| Kurwitu | 1,500.0 | 0.0% | 0.0% | 2.1 | - | - | - | 0.0% |
| Olympia Capital | 2.15 | 1.9% | 7.0% | 1.7 | 0.0 | 8.3 | 8.3 | 0.0% |
| TransCentury | 1.58 | -4.8% | -36.8% | - | 0.0 | - | 39.5 | 0.0% |
| Investment Service | | | | | | | | |
| NSE | 8.48 | 1.4% | -32.4% | - | 0.4 | 11.9 | 24.9 | 3.4% |
| Manufacturing | | | | | | | | |
| BOC | 56.50 | 2.3% | -2.6% | 355.0 | 0.0 | 7.4 | 7.3 | 9.2% |
| BAT | 355.75 | 0.2% | -25.6% | 8.0 | 36.7 | 8.4 | 8.0 | 9.8% |
| Carbacid | 8.06 | 0.2% | -1.5% | 164.2 | 0.4 | 5.5 | 5.2 | 8.7% |
| EABL | 161.25 | -1.8% | -17.7% | 1.4 | 120.2 | 13.2 | 13.2 | 5.3% |
| Flame Tree | 1.29 | -7.9% | -43.9% | 11.1 | 0.1 | 0.9 | 1.2 | 0.0% |
| Kenya Orchards | 11.05 | 0.0% | -11.6% | 0.3 | - | 33.5 | 36.8 | 0.0% |
| Mumias Sugar | 0.27 | 0.0% | 0.0% | 32.2 | - | - | - | 0.0% |
| Unga Group | 30.00 | -6.3% | -11.8% | - | 0.1 | 6.9 | 8.0 | 1.7% |
| Telecommunication | | | | | | | | |
| Safaricom | 30.00 | -0.2% | -4.2% | 30.1 | 873.2 | 19.0 | 19.0 | 4.2% |

Source: Nairobi Securities Exchange & Central Bank of Kenya



Market Watch:



Weekly Equity Turnover



Weekly Bond Turnover



Sector Performances

| Segment | 25-Sep-20 | 02-Oct-20 | Week/W week | YTD (%) |
|--------------------|-----------|-----------|-------------|---------|
| Banking | 59.10 | 58.86 | 0.40 | 30.07 |
| Manufacturing | 42.46 | 41.74 | 1.71 | 15.62 |
| Telecommunication | 112.34 | 112.15 | 0.17 | 4.15 |
| Energy & Petroleum | 62.82 | 62.11 | 1.13 | 18.17 |
| Insurance | 38.04 | 40.15 | 5.57 | 22.87 |
| Construction | 34.26 | 33.36 | 2.65 | 34.57 |
| Commercial | 34.26 | 33.72 | 1.58 | 19.73 |
| Agricultural | 71.71 | 70.89 | 1.15 | 5.95 |
| Automobile | 88.54 | 88.14 | 0.45 | 14.23 |
| Investment | 49.20 | 47.93 | 2.58 | 19.38 |
| NSE 20 | 1,847.63 | 1,852.17 | 0.25 | 30.37 |
| NASI | 140.37 | 140.22 | 0.11 | 15.52 |

Source: Nairobi Securities Exchange & Sterling Capital Research

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 | 6.2 | 4.9 | 154.7 |
| 182 Day | 10.0 | 4.1 | 3.5 | 40.6 |
| 364 Day | 10.0 | 5.3 | 2.3 | 53.3 |
| Total | 24.0 | 15.6 | 10.7 | 64.9 |

Source: Central Bank of Kenya

| Treasury Bill | Yield (%) Week 38 | Yield (%) Week 39 | Δ from previous auction (bps) |
|---------------|-------------------|-------------------|-------------------------------|
| 91-Day | 6.309 | 6.400 | 9.1 |
| 182-Day | 6.773 | 6.839 | 6.6 |
| 364-Day | 7.690 | 7.744 | 5.4 |

Source: Central Bank of Kenya

2) Key Rates

| Key Rates | (%) | Date |
|---------------------|-------|-----------|
| CBK Rate | 7.00 | 29-Jul-20 |
| Interbank Rate | 3.58 | 01-Oct-20 |
| CBK Discount Window | 13.00 | 29-Jul-20 |
| REPO | 2.86 | 08-Sep-20 |
| Horizontal REPO | 11.50 | 02-Sep-14 |
| Inflation | 4.36 | 31-Aug-20 |

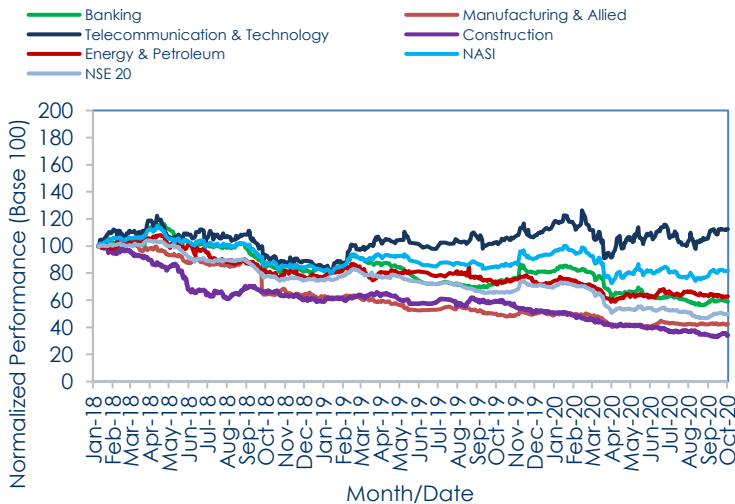
Source: Central Bank of Kenya & Kenya National Bureau of Statistics

Company Announcements

| Company | Announcement | Book Closure Date | Payment Date |
|----------|--------------------------------|-------------------|---------------------|
| CENTUM | First& Final Dividend KES.1.20 | 02/10/2020 | Subject to Approval |
| KENGEN | Final Dividend KES.0.25 | 22/10/2020 | 17/12/2020 |
| KENYA-RE | First& Final Dividend KES.0.10 | 09/10/2020 | 20/11/2020 |

Source: Nairobi Securities Exchange

Sector Performance



Source: Nairobi Securities Exchange