

## MARKET COMMENTARY

Tuesday, 1<sup>st</sup> December 2020

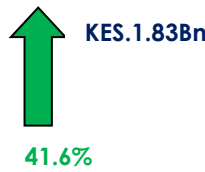
### Indices



### Equity Turnover



### Bonds Turnover



### Company Statistics

Counter	Price (KES)	Price Δ	Volume	Turnover (KES.000)	Dividend (KES)	Div. Yield	Trailing P/E
ABSA Group	9.78	2.5%	480,400	4,698.3	1.1	11.2%	7.1
Bamburi	28.10	0.5%	14,700	413.1	1.0	0.0%	5.2
BAT	375.00	0.8%	100	37.5	35.0	9.3%	9.2
BRITAM	7.02	-2.5%	8,400	59.0	-	0.0%	5.0
Centum	16.80	0.0%	24,000	403.2	1.2	7.1%	1.3
Co-op Bank	11.55	0.0%	70,000	808.5	1.0	8.7%	4.7
DTB	61.75	0.0%	-	-	2.7	4.4%	2.5
EABL	153.00	0.0%	305,500	46,741.5	8.5	5.6%	16.7
Equity group	35.05	1.3%	171,900	6,025.1	2.5	7.1%	5.9
Housing Finance	3.16	-4.0%	11,700	37.0	-	0.0%	-
I&M	45.50	0.0%	-	-	2.6	5.6%	3.6
Jubilee	270.00	0.0%	100	27.0	8.0	3.0%	4.7
KCB	37.20	0.5%	7,834,700	291,450.8	3.3	9.0%	5.0
KenGen	4.52	0.0%	310,600	1,403.9	0.4	8.8%	3.8
Kenya Airways	3.83	0.0%	-	-	-	0.0%	0.4
Kenya Re	2.10	-2.3%	69,800	146.6	0.5	21.4%	0.6
KPLC	1.40	-2.8%	1,125,300	1,575.4	-	0.0%	0.4
Nation	15.40	1.3%	9,300	143.2	5.0	32.5%	1.3
NCBA	21.70	-3.6%	14,500	314.7	1.8	8.1%	2.5
NSE	8.00	0.0%	439,900	3,519.2	0.5	6.1%	25.9
Safaricom	32.30	-1.2%	10,666,600	344,531.2	1.4	4.3%	36.3
Sasini	17.30	0.3%	3,900	67.5	0.5	2.9%	12.4
Stanbic	77.25	-2.2%	600	46.4	7.1	9.1%	4.8
Standard	22.80	0.0%	-	-	0.6	2.6%	7.1
Total	23.00	0.0%	50,400	1,159.2	1.3	5.7%	2.5
Transcentury	1.33	4.7%	1,300	1.7	-	0.0%	-

Source: Nairobi Securities Exchange

### KEY NSE MARKET INDICATORS

Indicator	30-Nov-20	01-Dec-20	%Δ
NSE 20 Share Index	1,759.93	1,752.17	0.4
NSE 25 Share Index	3,264.15	3,254.52	0.3
NASI	145.20	144.39	0.6
FTSE 15	170.31	170.37	0.04
FTSE 25	189.28	189.44	0.1
Turnover KES' Bn	1.66	0.71	57.2
Shares Traded 'Mn	49.67	22.53	54.6
Bonds KES' Bn	1.29	1.83	41.6
Mkt. Cap KES' Bn	2,229.49	2,217.25	0.6

NSE-20 SHARE	LEVELS	POINTS	%Δ
1DAY	1,759.93	-7.76	0.5
WTD	1,790.72	-38.55	2.2
MTD	1,783.68	-31.51	1.8
YTD	2,673.94	-921.77	34.5
1YR	2,618.62	2,652.95	33.1

TOP GAINERS			TOP LOSERS		
Counter	Price	%Δ	Counter	Price	%Δ
NBV	5.32	649.3	UMME	6.56	8.9
BKG	14.75	9.3	FTGH	1.30	5.8
CARB	12.80	8.0	LBTY	6.82	4.8
TCL	1.33	4.7	CRWN	38.30	4.3
OCH	2.30	4.6	HFCK	3.16	4.0

### TOP MOVERS

Counters	Price	Volumes (Mn)	Turnover (Mn)	Foreign Activity (%)
SCOM	32.30	10.67	344.74	82.4
KCB	37.20	7.83	291.35	51.3
EABL	153.00	0.31	46.75	80.7

### FOREIGN INVESTOR ACTIVITY

Counter	Buys (Mn)	% of Total Turnover	Counter	Sell (Mn)	% of Total Turnover
SCOM	341.51	99.1	KCB	287.23	98.6
EABL	29.90	64.0	SCOM	226.94	65.8
KCB	11.49	3.9	EABL	45.58	97.5
Others	7.09	-	Others	10.18	-
<b>Total</b>	<b>389.99</b>		<b>Total</b>	<b>569.94</b>	

### STERLING CAPITAL SECTOR INDICES

Segment	30-Nov-20	01-Dec-20	%Δ
Banking	57.13	56.96	0.3
Manufacturing	45.14	45.28	0.3
Telecommunications	122.24	120.75	1.2
Energy & Petroleum	57.07	55.71	2.4
Insurance	37.31	36.57	2.0
Construction	31.39	31.01	1.2

### FIXED INCOME MARKET STATISTICS

Benchmark	Previous Auction	Rate %	Δ bps
91-Day	6.706	6.730	2.4
182-Day	7.152	7.193	4.1
364-Day	8.094	8.151	5.7

### CURRENCY WATCH

Currency	30-Nov-20	01-Dec-20	%Δ
\$/KES	110.05	110.07	0.02
£/KES	146.72	146.86	0.1
€/KES	131.18	131.66	0.4

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

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