

## MARKET COMMENTARY

Monday, 7<sup>th</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	0.2%	122,000	1,193.2	1.1	11.2%	7.1
Bamburi	29.90	-0.2%	56,400	1,686.4	1.0	0.0%	5.5
BAT	390.25	-2.4%	67,000	26,146.8	35.0	9.0%	9.6
BRITAM	7.20	0.0%	4,900	35.3	-	0.0%	5.1
Centum	16.55	1.5%	13,500	223.4	1.2	7.3%	1.3
Co-op Bank	11.65	0.4%	58,200	678.0	1.0	8.6%	4.8
DTB	65.00	2.4%	100	6.5	2.7	4.2%	2.7
EABL	154.00	-0.5%	1,900	292.6	8.5	5.5%	16.8
Equity group	34.75	-0.9%	81,500	2,832.1	2.5	7.2%	5.9
Housing Finance	3.30	-1.2%	1,100	3.6	-	0.0%	-
I&M	45.85	-0.3%	24,000	1,100.4	2.6	5.6%	3.7
Jubilee	270.00	0.0%	500	135.0	8.0	3.0%	4.7
KCB	36.90	0.5%	153,900	5,678.9	3.3	9.1%	4.9
KenGen	4.74	-1.9%	84,100	398.6	0.4	8.4%	4.0
Kenya Airways	3.83	0.0%	-	-	-	0.0%	0.4
Kenya Re	2.17	0.5%	22,100	48.0	0.5	20.7%	0.7
KPLC	1.31	-2.2%	675,600	885.0	-	0.0%	0.4
Nation	15.10	0.0%	27,800	419.8	5.0	33.1%	1.3
NCBA	23.30	1.7%	22,400	521.9	1.8	7.5%	2.7
NSE	7.96	-2.2%	19,300	153.6	0.5	6.2%	25.8
Safaricom	33.00	-1.5%	1,243,900	41,048.7	1.4	4.2%	37.1
Sasini	17.50	2.6%	300	5.3	0.5	2.9%	12.6
Stanbic	78.50	-0.9%	3,500	274.8	7.1	9.0%	4.9
Standard	22.80	0.0%	-	-	0.6	2.6%	7.1
Total	23.50	2.0%	800	18.8	1.3	5.5%	2.6
Transcentury	1.21	-9.0%	14,100	17.1	-	0.0%	-

Source: Nairobi Securities Exchange

### KEY NSE MARKET INDICATORS

Indicator	04-Dec-20	07-Dec-20	%Δ
NSE 20 Share Index	1,786.42	1,782.78	0.2
NSE 25 Share Index	3,312.97	3,293.65	0.6
NASI	148.12	146.75	0.9
FTSE 15	172.20	171.56	0.4
FTSE 25	192.43	190.95	0.8
Turnover KES' Bn	1.09	0.09	92.0
Shares Traded 'Mn	34.35	3.23	90.6
Bonds KES' Bn	0.78	1.73	121.8
Mkt. Cap KES' Bn	2,274.77	2,253.71	0.9

NSE-20 SHARE	LEVELS	POINTS	%Δ
1DAY	1,786.42	-3.64	0.2
WTD	1,759.93	22.85	1.3
MTD	1,769.54	13.24	0.8
YTD	2,673.94	-891.16	33.3
1YR	2,621.55	2,652.95	32.0

TOP GAINERS			TOP LOSERS		
Counter	Price	%Δ	Counter	Price	%Δ
NBV	4.66	8.4	TCL	1.21	9.0
OCH	2.50	7.8	UMME	6.70	4.3
BKG	16.00	6.7	GLD	1,890.00	3.3
EVRD	1.15	3.6	BAT	390.25	2.4
SASN	17.50	2.6	KPLC	1.31	2.2

### TOP MOVERS

Counters	Price	Volumes (Mn)	Turnover (Mn)	Foreign Activity (%)
SCOM	33.00	1.24	41.07	78.9
BAT	390.25	0.07	26.14	85.6
KCB	36.90	0.15	5.68	47.2

### FOREIGN INVESTOR ACTIVITY

Counter	Buys (Mn)	% of Total Turnover	Counter	Sell (Mn)	% of Total Turnover
SCOM	30.54	74.4	SCOM	34.29	83.5
BAT	20.98	80.3	BAT	23.75	90.9
KCB	2.56	45.1	KCB	2.80	49.3
Others	0.82		Others	1.22	
<b>Total</b>	<b>54.91</b>		<b>Total</b>	<b>62.06</b>	

### STERLING CAPITAL SECTOR INDICES

Segment	04-Dec-20	07-Dec-20	%Δ
Banking	57.80	58.04	0.4
Manufacturing	44.88	44.76	0.3
Telecommunications	125.23	123.36	1.5
Energy & Petroleum	56.71	55.97	1.3
Insurance	37.29	37.41	0.3
Construction	31.48	31.57	0.3

### FIXED INCOME MARKET STATISTICS

Benchmark	Previous Auction	Rate %	Δ bps
91-Day	6.730	6.861	13.1
182-Day	7.193	7.333	14.0
364-Day	8.151	8.204	5.3

### CURRENCY WATCH

Currency	04-Dec-20	07-Dec-20	%Δ
\$/KES	111.06	111.13	0.1
£/KES	148.74	149.79	0.7
€/KES	134.44	135.08	0.5

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

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