

MARKET COMMENTARY

Monday, 28th December 2020

Indices

NSE 20
1,830.06
YTD **-31.6%**
0.5%

NSE 25
3,345.45
YTD **-18.4%**
0.04%

NASI
150.29
YTD **-9.5%**
0.1%

Equity Turnover

KES.0.11 Bn
78.6%

Bonds Turnover

KES.2.28 Bn
28.4%

Company Statistics

Counter	Price (KES)	Price Δ	Volume	Turnover (KES.000)	Dividend (KES)	Div. Yield	Trailing P/E
ABSA Group	9.42	-2.1%	31,800	299.6	1.1	11.7%	6.9
Bamburi	37.70	-0.5%	35,600	1,342.1	1.0	0.0%	6.9
BAT	389.50	1.2%	1,600	623.2	35.0	9.0%	9.5
BRITAM	6.94	-3.3%	8,500	59.0	-	0.0%	4.9
Centum	16.00	0.3%	140,700	2,251.2	1.2	7.5%	1.3
Co-op Bank	11.90	0.0%	2,087,800	24,844.8	1.0	8.4%	4.9
DTB	73.50	1.4%	2,500	183.8	2.7	3.7%	3.0
EABL	153.00	-1.9%	3,200	489.6	8.5	5.6%	16.7
Equity group	35.00	1.0%	19,900	696.5	2.5	7.1%	5.9
Housing Finance	3.20	1.3%	13,400	42.9	-	0.0%	-
I&M	43.40	0.0%	-	-	2.6	5.9%	3.5
Jubilee	285.00	0.6%	100	28.5	8.0	2.8%	4.9
KCB	37.55	1.5%	139,500	5,238.2	3.3	8.9%	5.0
KenGen	4.50	-4.1%	1,151,200	5,180.4	0.4	8.9%	3.8
Kenya Airways	3.83	0.0%	-	-	-	0.0%	0.4
Kenya Re	2.33	-1.3%	122,800	286.1	0.5	19.3%	0.7
KPLC	1.55	-0.6%	548,400	850.0	-	0.0%	0.4
Nation	15.70	-1.3%	9,200	144.4	5.0	31.8%	1.3
NCBA	24.10	-1.6%	21,600	520.6	1.8	7.3%	2.8
NSE	8.24	-0.2%	3,600	29.7	0.5	5.9%	26.7
Safaricom	34.10	0.3%	1,832,100	62,474.6	1.4	4.1%	38.3
Sasini	17.10	-4.5%	2,100	35.9	0.5	2.9%	12.3
Stanbic	80.00	1.3%	1,500	120.0	7.1	8.8%	5.0
Standard	21.00	-7.9%	200	4.2	0.6	2.9%	6.6
Total	24.00	2.3%	100	2.4	1.3	5.4%	2.6
TransCentury	1.49	8.0%	8,800	13.1	-	0.0%	-

Source: Nairobi Securities Exchange

KEY NSE MARKET INDICATORS

Indicator	24-Dec-20	28-Dec-20	%Δ
NSE 20 Share Index	1,839.51	1,830.06	0.5
NSE 25 Share Index	3,344.26	3,345.45	0.04
NASI	150.18	150.29	0.1
FTSE 15	173.68	173.55	0.1
FTSE 25	194.49	194.87	0.2
Turnover KES' Bn	0.51	0.11	78.6
Shares Traded 'Mn	13.11	6.59	49.7
Bonds KES' Bn	1.77	2.28	28.4
Mkt. Cap KES' Bn	2,306.99	2,308.76	0.1

NSE-20 SHARE	LEVELS	POINTS	%Δ
1DAY	1,839.51	-9.45	0.5
WTD	1,810.82	19.24	1.1
MTD	1,758.05	72.01	4.1
YTD	2,673.94	-843.88	31.6
1YR	2,646.14	2,652.95	30.8

TOP GAINERS

Counter	Price	%Δ	Counter	Price	%Δ
FIGH	1.36	8.8	SGL	21.00	7.9
TCL	1.49	8.0	SASN	17.10	4.5
CABL	1.36	4.6	KEGN	4.50	4.1
TOTL	24.00	2.4	LBTY	7.52	3.8
CARB	12.15	2.1	BRIT	6.94	3.3

TOP LOSERS

TOP MOVERS

Counters	Price	Volumes (Mn)	Turnover (Mn)	Foreign Activity (%)
SCOM	34.10	1.83	62.45	45.8
COOP	11.90	2.09	24.85	-
KCB	37.55	0.14	5.24	31.3

FOREIGN INVESTOR ACTIVITY

Counter	Buys (Mn)	% of Total Turnover	Counter	Sell (Mn)	% of Total Turnover
SCOM	55.00	88.1	KEGN	4.15	80.0
BAT	0.47	75.1	KCB	3.28	62.6
KPLC	0.11	12.8	SCOM	2.18	3.5
Others	0.03	-	Others	0.49	-
Total	55.61		Total	10.09	

STERLING CAPITAL SECTOR INDICES

Segment	24-Dec-20	28-Dec-20	%Δ
Banking	58.84	58.99	0.3
Manufacturing	43.99	44.52	1.2
Telecommunications	127.10	127.48	0.3
Energy & Petroleum	58.75	58.46	0.5
Insurance	39.79	39.23	1.4
Construction	32.69	32.95	0.8

FIXED INCOME MARKET STATISTICS

Benchmark	Previous Auction	Rate %	Δ bps
91-Day	6.916	6.929	1.3
182-Day	7.399	7.403	0.4
364-Day	8.283	8.338	5.5

CURRENCY WATCH

Currency	24-Dec-20	28-Dec-20	%Δ
\$/KES	108.79	108.77	0.02
£ /KES	146.11	147.63	1.0
€/KES	132.65	132.68	0.02

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

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