

Weekly Market Report

Week - 09(24th Feb 2020-28th Feb 2020)



Key Market Indicators

Key Indicators (Weekly)	21-feb-20	28-Feb-20	Δ (%)
NSE20 Share Index	2,498.94	2,337.03	6.5
NSE25 Share Index	3,917.46	3,662.74	6.5
NSE All Share Index	158.28	148.60	6.2
Equity Turnover(KshBn)	2.48	2.93	18.1
Volume Traded (Mn)	87.01	90.40	3.9
Bonds Traded (KES Bn)	11.34	16.00	41.1
Mkt. Cap. (Ksh Billion)	2,417.13	2,267.61	6.2
Mkt. Cap. (US\$ Billions)	23.86	22.46	5.9

Top Gainer Stocks

Stock	21-Feb20	28-feb-20	Δ (%)
FLAME TREE	1.46	1.61	10.3
CAR & GENERAL	24.00	26.00	8.3
EXPRESS	6.00	6.50	8.3
STANBIC	106.00	112.00	5.7
UMEME	7.20	7.58	5.3

Top Loser Stocks

Stock	21-feb-20	28-Feb-20	Δ (%)
STANDARD	25.85	21.50	16.8
HFCK	5.30	4.55	14.2
KPLC	2.70	2.34	13.3
DTK	112.00	100.00	10.7
BAMBURI	62.50	56.00	10.4

Top Movers

Counter	Price for the day (Ksh)	Vol for the week 'Mn'	Value for the week (Ksh 'Mn')
SAFARCOM	27.90	51.10	1,425.74
KCB	44.95	12.67	569.53
EQTY	45.25	10.51	475.37
EABL	194.25	0.79	153.52
DTK	100.00	0.68	67.86

Foreign Trades - (24-Feb-2020- -28-Feb-2020)

Day	BUYS(Ksh 'Mn')	SALES(Ksh 'Mn')	NET(Ksh 'Mn')
Monday	124.32	230.54	-106.22
Tuesday	283.93	409.25	-125.32
Wednesday	129.63	98.26	31.37
Thursday	367.45	645.41	-277.96
Friday	776.98	610.76	166.23
Total	1,682.31	1,994.22	311.91

Market Statistics (Values in 'Mn') 24-Feb- 2020-28-Feb- 2020)

Day	Turnover (Mn)	Foreign Buys %	Foreign Sales %	Vol(Mn)
Monday	290.67	21.4	39.7	9.30
Tuesday	502.49	28.3	40.7	16.89
Wednesday	268.74	24.1	18.3	9.13
Thursday	893.78	20.6	36.1	28.09
Friday	976.39	39.8	31.3	27.02
Total	2,932.08	1.3	1.6	90.43

Average Interbank Rates

Date	Value (KshBn)	Ave. Interbank Rate (%)
13-Feb-20-20-Feb 2020	69.2	4.1
21-Feb-2020	11.84	4.3
24-Feb-2020	13.89	4.3
25-Feb-2020	20.20	4.2
26-Feb-2020	16.05	4.0
27-Feb-2020	17.90	4.0
21-Feb-20-27-Feb-2020	79.9	4.2

Currency	21-feb-20	28-feb-20	Δ %
US Dollar	101.29	100.98	0.3
STG Pound	130.39	130.11	0.2
EURO	109.37	110.78	1.3
Japanese Yen	90.47	91.88	1.6
SA Rand	6.70	6.55	2.2
KES/USHS	36.19	36.74	1.5
KES/TSHS	22.80	22.82	0.1
KES/RWF	9.39	9.42	0.3

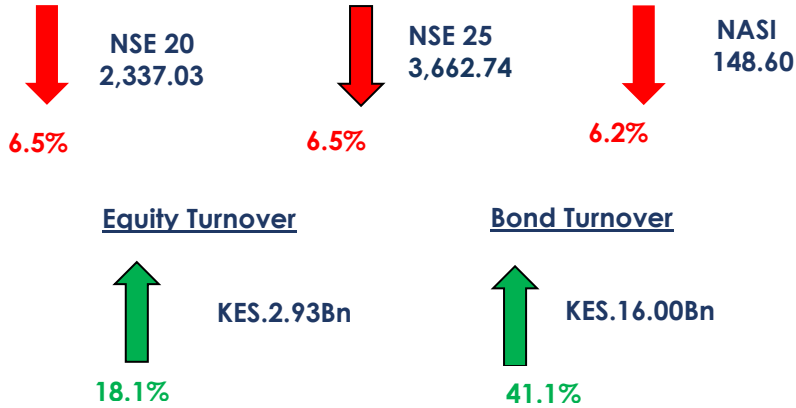
Weekly Statistics

	This Week	Δ% W/W	Price Δ% YTD	20 Day Avg	Turnover (KES)	P/E	Trailing P/E	Div Yield (%)
Agricultural								
Eaagads	10.00	-9.1%	-1.0%	11.0	0.0	-	17.9	0.0%
Kakuzi	319.00	-0.3%	-6.2%	320.0	0.3	11.8	11.8	2.8%
Kapchorua Tea	78.00	-6.0%	-2.5%	83.5	0.1	-	2.6	12.8%
Limuru Tea	440.00	0.0%	-2.2%	440.0	-	346.5	234.0	0.2%
Sosini	16.45	-1.2%	0.6%	16.5	1.7	3.8	2.4	6.2%
Williamson Tea	123.25	-1.4%	-11.3%	125.0	0.3	-	3.1	16.2%
Automobiles								
Car & General	26.00	8.3%	0.0%	24.0	0.0	34.2	18.8	3.1%
Banking								
Barclays Bank	12.95	0.0%	-3.0%	13.0	14.8	9.5	10.2	8.5%
Diamond Trust	100.00	-10.7%	-9.9%	49.5	-	4.2	4.1	2.6%
Equity Bank	45.25	-8.6%	-16.6%	49.5	67.9	8.7	6.7	4.4%
Housing Finance	4.55	-14.2%	-28.2%	5.4	475.4	-	-	0.0%
I&M Holdings	50.00	-8.3%	-7.4%	54.9	1.5	3.2	2.8	7.8%
KCB	44.95	-10.1%	-17.1%	50.7	569.5	5.7	6.6	7.8%
National Bank	-	0.0%	0.0%	-	-	-	-	0.0%
NIC Bank	33.10	-7.5%	-10.2%	36.1	29.4	5.0	4.7	3.8%
Stanbic Holdings	112.00	5.7%	2.5%	106.0	2.4	7.1	6.6	5.2%
StanChart	200.50	-0.6%	0.2%	201.8	5.5	8.5	10.0	9.5%
Co-op Bank	13.55	-8.8%	-17.1%	14.8	31.5	6.2	5.6	7.4%
Commercial								
Atlas Development	-	-	-	-	-	-	-	-
Deacons E A	1.03	0.0%	0.0%	0.5	-	-	-	0.0%
Eveready	6.50	0.0%	-5.5%	1.0	0.0	0.4	0.4	0.0%
Express	2.19	8.3%	-5.0%	6.0	0.0	-	-	0.0%
Kenya Airways	5.28	-1.8%	4.8%	2.2	0.2	-	-	0.0%
Longhorn Kenya	0.70	-5.7%	-22.6%	5.6	0.1	8.0	8.0	9.8%
Nairobi Business V.	27.50	0.0%	0.0%	0.7	0.0	0.3	0.3	0.0%
Nation Media	2.56	-9.1%	-30.8%	30.3	4.5	2.3	2.5	18.2%
Sameer Africa	21.50	0.0%	-25.8%	2.6	0.0	-	-	0.0%
Standard Group	17.00	-16.8%	-22.0%	25.9	0.1	10.0	9.3	0.0%
TPS EA	0.29	-7.9%	-3.1%	18.7	0.6	10.4	-	2.1%
Uchumi	16.40	-3.3%	0.0%	0.3	0.0	-	0.2	0.0%
WPP Scangroup	16.40	-0.6%	-8.4%	16.5	2.0	14.6	10.9	2.1%
Construction								
ARM	5.55	0.0%	0.9%	62.5	-	-	-	0.0%
Bamburi Cement	56.00	-10.4%	-30.0%	62.0	0.6	3.9	4.1	7.3%
Crown Berger	60.00	-3.2%	-4.0%	2.0	0.0	92.3	69.8	1.0%
E.A.Cables	1.80	-10.0%	-29.4%	14.3	0.1	-	-	0.0%
E.A.Portland	14.25	0.0%	-1.7%	-	-	0.3	0.2	0.0%
Energy								
KenGen	5.44	-1.1%	-6.2%	22.0	16.7	4.0	5.0	7.4%
Kenolkobil	22.00	0.0%	0.0%	2.7	-	13.4	16.1	0.0%
KPLC	2.34	-13.3%	-22.8%	26.7	3.0	0.6	0.6	0.0%
Total Kenya	26.00	-2.4%	-7.5%	7.2	0.4	10.1	9.0	5.0%
Umeme Ltd	7.58	5.3%	-8.5%	-	0.0	3.7	4.3	7.3%
Insurance								
BRITAM	7.34	-9.2%	-20.0%	2.7	7.4	-	-	0.0%
CIC	2.63	-1.9%	-6.4%	352.5	0.1	37.6	20.2	4.9%
Jubilee	338.00	-4.1%	-3.4%	3.0	6.2	7.9	7.7	2.7%
Kenya Re	2.80	-6.0%	-7.6%	9.5	5.6	0.5	0.5	16.1%
Liberly Kenya	9.12	-4.0%	-12.7%	16.6	0.0	7.8	8.7	0.0%
Sanlam	17.00	2.1%	-5.6%	-	0.1	27.0	-	0.0%
Investments								
Centum	24.60	-9.6%	-16.9%	0.5	25.9	2.3	2.1	0.0%
Home Afrika	0.43	-4.4%	-21.8%	1,500.0	0.2	-	-	0.0%
Kurwitu	1,500.00	0.0%	0.0%	2.4	-	-	-	0.0%
Olympia Capital	2.50	4.2%	24.4%	2.3	0.1	9.6	9.6	0.0%
TransCentury	2.30	0.0%	-8.0%	-	-	-	57.5	0.0%
Investment Service								
NSE	10.10	-7.8%	-19.5%	-	0.7	14.2	29.7	2.9%
Manufacturing								
BOC	63.00	-2.7%	8.6%	490.0	0.1	8.3	8.1	8.3%
BAT	488.00	-0.4%	2.1%	9.1	0.5	11.5	10.9	7.2%
Carbacid	8.50	-6.8%	3.9%	206.1	0.5	5.8	5.5	8.2%
EABL	194.25	-5.6%	-0.9%	1.5	153.5	15.9	15.9	4.4%
Flame Tree	1.61	10.3%	-30.0%	12.5	0.2	1.2	1.5	0.0%
Kenya Orchards	12.50	0.0%	0.0%	0.3	-	37.9	41.7	0.0%
Mumias Sugar	0.27	0.0%	0.0%	33.6	-	-	-	0.0%
Unga Group	31.00	-8.4%	-8.8%	-	0.1	7.2	8.3	1.6%
Telecommunication								
Safaricom	27.90	-6.7%	-10.9%	30.0	1,425.7	17.7	17.7	4.5%

Source: Nairobi Securities Exchange & Central Bank of Kenya



Market Watch:

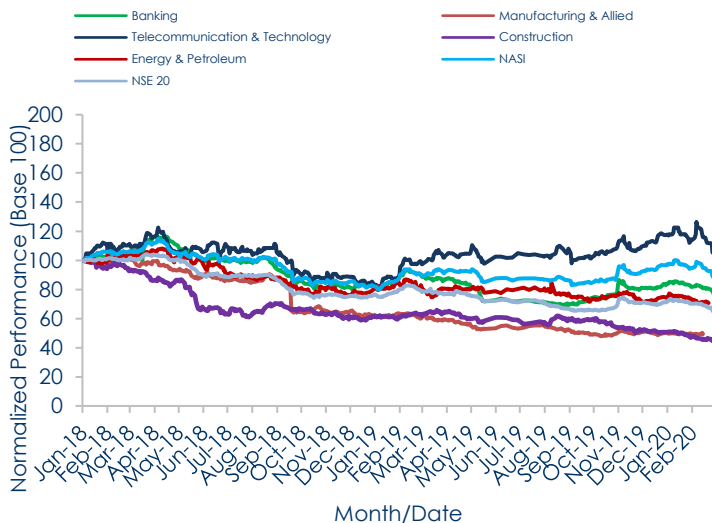


Sector Performances

Segment	21-Feb-20	28-Feb-20	Week/Week	YTD (%)
Banking	80.64	74.73	7.3	11.2
Manufacturing	48.44	47.55	0.7	1.9
Telecommunication	111.78	104.20	6.7	10.9
Energy & Petroleum	70.62	68.84	2.5	9.3
Insurance	49.04	47.13	3.9	9.5
Construction	45.99	43.76	4.8	14.2
Commercial	38.81	37.54	3.3	10.7
Agricultural	66.36	64.33	3.1	3.9
Automobile	94.86	102.77	8.3	0.0
Investment	57.22	56.03	2.1	5.8
NSE 20	2,498.94	2,337.03	6.5	12.6
NASI	158.38	148.60	6.2	10.5

Source: Nairobi Securities Exchange & Sterling Capital Research

Sector Performance



Source: Nairobi Securities Exchange

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	2.337	2.335	58.43
182-Day	10.0	3.630	2.660	36.31
364-Day	10.0	48.429	10.003	484.29
Total	24.0	54.396	14.999	226.65

Source: Central Bank of Kenya

Treasury Bill	Yield (%) Week 08	Yield (%) Week 09	Δ from previous auction
91-Day	7.319	7.315	0.004
182-Day	8.258	8.235	0.023
364-Day	9.799	9.500	0.299

Source: Central Bank of Kenya

2) Key Rates

Key Rates	(%)	Date
CBK Rate	8.25	27-Jan-20
Interbank Rate	4.00	27-Feb-20
CBK Discount Window	14.25	27-Jan-19
REPO	6.90	16-Aug-19
Horizontal REPO	11.50	02-Sep-14
Inflation	5.78	Jan-20

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

Company Announcements

Company	Announcement	Book Closure Date	Payment Date
EABL	Interim dividend KES.3.00	28/02/2020	17/04/2020
BAT	Final dividend KES.30.00	20/03/2020	29/04/2020

Source: Nairobi Securities Exchange