

Daily Market Report 1st April 2019

Top Gainers

Company	(%)	Vol.
FAHR	8.23%	5,200
UCHM	7.14%	1,000
HAFR	5.26%	300
SASN	4.38%	500
EQTY	3.37%	1,835,400

(Source: NSE, AIB)

Top Losers

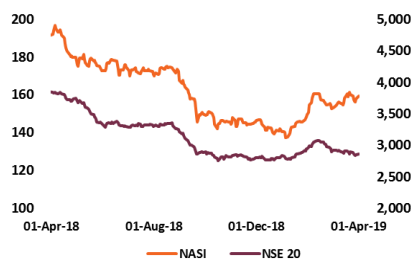
Company	(%)	Vol.
ORCH	-10.00%	400
LKL	-5.36%	1,300
BERG	-3.86%	200
SCBK	-2.56%	600
MSC	-1.96%	90,800

(Source: NSE, AIB)

Top Movers

Company	Vol.
SCOM	8,473,300
EQTY	1,835,400
KCB	696,000
MSC	90,800
KEGN	60,000

Market Index Movement



Currency

	Today	Previous	% A
USD/KES	100.7500	100.8778	-0.13%
EUR/KES	113.0433	113.5489	-0.45%
GBP/KES	131.8478	133.4539	-1.20%
JPY(100)/KES	90.9419	91.6030	-0.72%
YUAN/KES	14.9486	14.9896	-0.27%
RUPEE/KES	1.4535	1.4609	-0.51%
KES/UGS	36.9480	36.7971	0.41%
KES/TZS	23.0770	23.2064	-0.56%
RAND/KES	8.9611	6.9024	29.83%

(Source: NSE, AIB)

Dear client,

Below are today highlights:

CURRENCY:

The shilling lost 0.03% against the dollar to close at 100.78 versus 100.75 traded on Friday. This was majorly attributed to an increase in demand for the dollar.

MONEY MARKET:

The money market liquidity increased as the interbank rate decreased from 3.1% to 2.6%.

EQUITIES:

The NSE remained closed for most of the day due technical challenges occasioned by the unavailability of connectivity to the Central Depository System (CDS). This affected core services including trading of equities and bonds. The issue was resolved at 3pm and trading was extended for 2 hours with the market closing at 5:00 P.M.

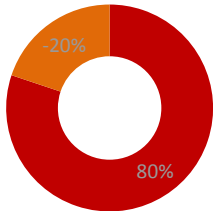
Activity was high once the market opened as the market turnover (for only two hours of trading) stood at 369.65Bn equivalent to 44% of the previous day's equity turnover of 664.81 Bn.

SUMMARY OF MARKET STATISTICS

KES	Today	Previous	%	Trend
Equity Turnover	369,697,055	665,093,641	(44.41)	↓
Total Volume Traded	11,493,400	18,602,500	(38.22)	↓
Market Cap (Bn KES)	2,380.75	2,360.52	0.86	↑
Bond Turnover (Bn KES)	3.40	2.68	26.75	↑
NSE 20 Share Index	2,849.59	2,846.35	0.11	↑
NSE All Share Index	159.01	157.66	0.86	↑
FTSE NSE KENYA 15 Index	197.47	196.42	0.53	↑
FTSE NSE Kenya 25 Index	205.85	205.09	0.37	↑
FTSE NSE KENYA Gov't bond index	96.62	96.60	0.02	↑
Foreign buys (KES)	564,693,240	564,693,240	-	-
Foreign Sales (KES)	418,419,574	418,419,574	-	-

(Source: NSE, AIB)

Foreign and Local Participation



Top Foreign Buys

Company	Vol.
SCOM	234,282,330
EQTY	78,809,125
KCB	27,276,090
EABL	10,884,200
BAT	5,450,000

(Source: NSE, AIB)

Top Foreign Sales

Company	Vol.
SCOM	229,587,080
EQTY	41,886,300
KCB	27,514,910
BAT	5,504,500
CFCI	1,992

(Source: NSE, AIB)

Top Trader (Ksh)

Top Trader (Ksh)	Vol.
SCOM	236,441,640
EQTY	78,914,825
KCB	30,755,735
EABL	10,884,200
BAT	5,558,300
ICDC	1,143,080
NMG	1,032,625
NIC	877,110
JUB	815,500
BBK	618,970
COOP	582,730
I&M	507,575
BRIT	338,620
KEGN	333,656

(Source: NSE, AIB)

4 Day Key Market indicators

Indicator	1 st April	29 th Mar	28 th Mar	27 th Ma
NSE 20	2849.59	2846.35	2,835.47	2,840.86
NASI	159.01	157.66	155.85	156.30
Market Cap (KES Bn)	2380.75	2360.52	2,340.19	2,340.19
Equity +I Reit turnover (KES Bn)	0.37	0.67	0.42	0.52
Bond Turnover (KES Bn)	3.40	2.68	3.69	5.15

(Source: NSE, AIB)

FIXED INCOME MARKET:

Secondary bond market turnover was up 27.33%, to stand at KES 3.40Bn from the KES 2.68Bn recorded in the previous week despite the total deals declining from 105 to 84 deals.

DAY'S FEATURE: Marginal increase in Inflation

	Headline	Food	Core
Oct-18	5.5%	0.52%	4.7%
Nov-18	5.58%	1.72%	4.6%
Dec-18	5.7%	2.54%	4.0%
Jan-19	4.7%	1.62%	3.5%
Feb-19	4.1%	1.70%	3.1%
Mar-19	4.35%	2.84%	3.1%

CPI ticked up slightly in March driven by an increase in food prices. Inflation in March marginally rose to 4.35% from 4.14% recorded the previous month. The slight increase in the CPI reported was driven by the rise of prices of certain foodstuffs.

We expect inflation to remain subdued supported by benign food and fuel prices. A recent warning by the Kenyan Meteorological Department of a possible drought presents a risk to this outlook.

The table below shows summary of trading activity at the Nairobi Stock Exchange at the end of day.

Security ID	Net Change	Per Change	Closing Price	Prev Closing Price	Total Turnover	Total Volume
FAHR	0.76	8.23	10.00	9.24	52,000	5,200
UCHM	0.04	7.14	0.60	0.56	600	1,000
HAFR	0.03	5.26	0.60	0.57	179	300
SASN	0.70	4.38	16.70	16.00	8,360	500
EQTY	1.40	3.37	43.00	41.60	78,914,825	1,835,400
FTGH	0.07	2.66	2.70	2.63	270	100
I&M	1.75	1.54	115.25	113.50	507,575	4,400
EABL	3.00	1.45	209.25	206.25	10,884,200	52,000
SCOM	0.35	1.27	27.90	27.55	236,441,640	8,473,300
NIC	0.35	0.96	36.70	36.35	877,110	23,900
CFCI	0.08	0.82	9.86	9.78	23,692	2,400
NMG	0.25	0.41	61.00	60.75	1,032,625	16,900
CIC	0.01	0.26	3.92	3.91	116,876	29,800
KCB	0.10	0.23	44.15	44.05	30,755,735	696,000
DTK	0.25	0.19	130.25	130.00	104,200	800
BAT	1.00	0.18	545.00	544.00	5,558,300	10,200
BBK	0.00	0.00	11.80	11.80	618,970	52,400
COOP	0.00	0.00	14.95	14.95	582,730	38,900
KNRE	0.00	0.00	11.00	11.00	67,345	6,100
KPLC	0.00	0.00	4.18	4.18	9,198	2,200
HFCK	0.00	0.00	5.00	5.00	7,500	1,500
WTK	0.00	0.00	145.00	145.00	101,500	700
CABL	0.00	0.00	3.00	3.00	1,500	500
BAMB	0.00	0.00	130.00	130.00	39,000	300
ARM	0.00	0.00	5.55	5.55	-	-
BOC	0.00	0.00	79.50	79.50	-	-
C&G	0.00	0.00	22.50	22.50	-	-
CARB	0.00	0.00	9.30	9.30	-	-
CFC	0.00	0.00	100.00	100.00	-	-
DCON	0.00	0.00	0.45	0.45	-	-
EGAD	0.00	0.00	14.30	14.30	-	-
EVRD	0.00	0.00	1.06	1.06	-	-
FIRE	0.00	0.00	1.83	1.83	-	-
GLD	0.00	0.00	1235.00	1235.00	-	-
KAPC	0.00	0.00	69.25	69.25	-	-
KENO	0.00	0.00	22.00	22.00	-	-
KUKZ	0.00	0.00	300.00	300.00	-	-
KURV	0.00	0.00	1500.00	1500.00	-	-
LIMT	0.00	0.00	550.00	550.00	-	-
NBV	0.00	0.00	1.00	1.00	-	-
OCH	0.00	0.00	2.50	2.50	-	-
PAFR	0.00	0.00	21.05	21.05	-	-
PORT	0.00	0.00	18.70	18.70	-	-
SCAN	0.00	0.00	12.00	12.00	-	-
TCL	0.00	0.00	2.99	2.99	-	-
TOTL	0.00	0.00	28.95	28.95	-	-
TPSE	0.00	0.00	20.50	20.50	-	-
UMME	0.00	0.00	8.06	8.06	-	-
UNGA	0.00	0.00	33.10	33.10	-	-
XPRS	0.00	0.00	7.50	7.50	-	-
NBK	-0.01	-0.20	4.92	4.93	986	200
BRIT	-0.02	-0.22	9.00	9.02	338,620	37,600
JUB	-1.00	-0.24	407.75	408.75	815,500	2,000
ICDC	-0.10	-0.31	31.90	32.00	1,143,080	35,800
KQ	-0.03	-0.61	4.88	4.91	42,975	8,800
NSE	-0.15	-1.09	13.60	13.75	80,245	5,900
KEGN	-0.08	-1.42	5.56	5.64	333,656	60,000
SGL	-0.35	-1.44	24.00	24.35	4,800	200
MSC	-0.01	-1.96	0.50	0.51	45,365	90,800
SCBK	-5.50	-2.56	209.75	215.25	126,000	600
BERG	-3.25	-3.86	81.00	84.25	16,200	200
LKL	-0.34	-5.36	6.00	6.34	7,800	1,300
ORCH	-1.40	-10.00	12.60	14.00	5,040	400

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