



Daily Market Report 30th June, 2020.

Top Gainers

Company	(%)	Vol.
KQ	9.70%	1,326,200
LBTY	6.93%	100
EVRD	4.81%	100
FTGH	4.67%	2,900
UCHM	3.33%	15,300

(Source: NSE, AIB)

Top Losers

Company	(%)	Vol.
CABL	-5.45%	26,600
HAFR	-4.65%	209,300
EABL	-4.55%	263,500
KNRE	-3.60%	615,900
CARB	-3.17%	18,300

(Source: NSE, AIB)

Top Movers

Company	Vol.
SCOM	8,318,800
KPLC	1,927,900
KQ	1,326,200
KCB	1,258,400
KNRE	615,900

(Source: NSE, AIB)

Market Index Movement



(Source: NSE, AIB)

Currency

	Today	Previous	% A
USD/KES	106.52	106.46	-0.06%
EUR/KES	120.14	119.44	-0.584%
GBP/KES	131.17	131.80	0.48%
JPY(100)/KES	99.14	99.30	0.16%
YUAN/KES	15.05	15.04	-0.08%
RUPEE/KES	1.41	1.41	-0.24%
KES/UGS	35.02	35.13	0.33%
KES/TZS	21.74	21.74	-0.03%
RAND/KES	6.18	6.14	-0.57%

(Source: NSE, AIB)

Dear client,

Below are today highlights:

CURRENCY:

The shilling depreciated against the greenback to trade at **KES 106.52/\$** in contrast to the **KES 106.46/\$** during the previous session. The shilling has remained under pressure since the mid-March, when the country reported its first case of COVID-19. Foreign investor outflows have increased and CBK has used its forex reserves in a bid to support the shilling. As at June 25th, CBK's usable foreign exchange reserves stood at **USD 9,229 million (5.55 months of import cover)**.

MONEY MARKET:

The interbank rate decreased to **3.14%** from **3.26%**.

EQUITIES:

Equity turnover at the NSE increased by **41.78%** to **KES 0.36Bn** from **KES 0.25Bn** recorded in the previous session. The top traders today were Safaricom, KCB and EABL. The counters' turnover stood at **KES 238Mn**, **KES 46Mn** and **KES 43Mn** respectively. Foreign investors were net-sellers recording net outflows of **KES 0.19Bn** as compared to net outflows of **KES 0.031Bn** in the previous session. In terms of company specific foreign activity, foreigners were net-sellers on Safaricom, EABL and KCB.

SUMMARY OF MARKET STATISTICS:

KES	Today	Previous	%	Trend	YTD
Equity Turnover	359,128,133	253,305,296	41.78	↑	18.22
Total Volume Traded	15,530,400	8,523,420	82.21	↑	45.55
Market Cap (Bn KES)	2,104.33	2,121.26	(0.80)	↓	(17.15)
Bond Turnover (Bn KES)	2.43	1.12	117.52	↑	4,921.59
NSE 20 Share Index	1,942.12	1,952.36	(0.52)	↓	(26.83)
NSE All Share Index	137.68	138.79	(0.80)	↓	(17.26)
FTSE NSE KENYA 15 Index	170.34	173.75	(1.96)	↓	(23.03)
FTSE NSE Kenya 25 Index	182.39	183.95	(0.85)	↓	(20.52)
FTSE NSE KENYA Gov't bond index	96.57	96.57	-	-	(0.95)
Foreign buys (KES)	113,975,575	181,945,155	(37.36)	↓	(53.63)
Foreign Sales (KES)	303,081,519	213,622,150	41.88	↑	298.32

(Source: NSE, AIB)

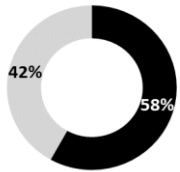


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Foreign and Local Participation



(Source: NSE, AIB)

Top Foreign Buys

Company	Vol.
SCOM	44,526,155
KCB	36,507,850
EABL	32,892,950
NSE	31,120
KEGN	10,600

(Source: NSE, AIB)

Top Foreign Sales

Company	Vol.
SCOM	216,959,190
KCB	41,374,900
EABL	39,687,300
EQTY	3,832,475
NSE	983,398

(Source: NSE, AIB)

Top Traders (Ksh)

Top Traders (Ksh)	
SCOM	238,342,520
KCB	45,734,610
EABL	42,847,075
EQTY	8,162,825
KQ	4,349,936
KPLC	3,701,793
NCBA	3,188,625
KEGN	3,021,988
COOP	1,926,985
KNRE	1,319,291
ABSA	1,186,998
NSE	1,095,168
BAT	1,017,100
CTUM	465,320
JUB	411,200

(Source: NSE, AIB)

4-Day Key Market Indicators

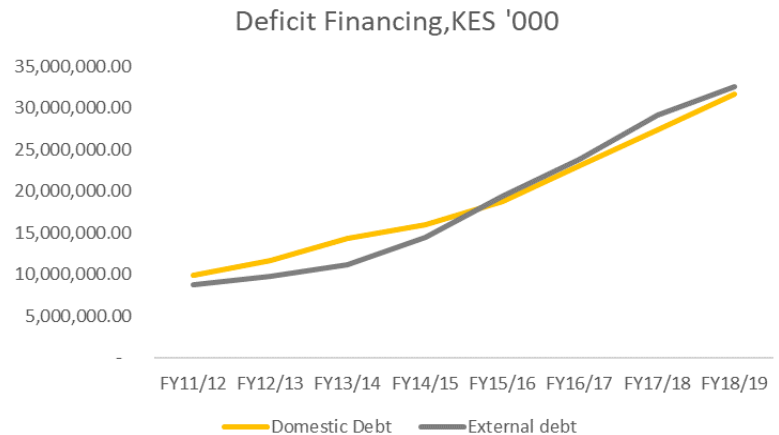
Indicator	30-June-20	29-June-20	26-June-20	25-June-20
NSE 20	1942.12	1952.36	1938.62	1937.96
NASI	137.68	138.79	137.75	137.56
Market Cap (KES Bn)	2104.33	2121.26	2105.36	2102.38
Equity + I Reit turnover (KES Bn)	0.36	0.25	0.35	0.70
Bond Turnover (KES Bn)	2.43	1.12	4.62	4.31

(Source: NSE, AIB)

FIXED INCOME MARKET:

Secondary bond market turnover was up, increasing by **117.52%** to **KES 2.43Bn** from **KES 1.12Bn** worth of bonds traded previously. The number of deals decreased to **99** from **105** in the previous session. The **FXD1/2018/15Yr** was today's most traded bond.

DAY'S FEATURE: Treasury achieves borrowing Target as bond appetite increases.



The National Treasury last week achieved its domestic borrowing target of KES 409 Bn for the 2019/2020 fiscal year after taking up a net of KES 15.7 Bn in June bond and bills auctions amid heavy investor appetite. It must be noted that the government's Treasury bills for the **91-day, 182-day** and **364-day** have been oversubscribed for the last two weeks indicating heightened investor appetite for bonds.

Domestic Debt has been on an upward trend in the last financial years and the treasury faces an uphill task in curtailing borrowing to finance the budget deficit created by high government expenditure and reducing revenues due to tax cuts made to stimulate the economy after the shocks brought about by Covid-19.

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	Foreign Buys	Foreign Sales
KQ	0.29	9.70%	3.28	2.99	4,349,936	1,326,200	-	656
LBTY	0.52	6.93%	8.02	7.50	802	100	-	-
EVRD	0.05	4.81%	1.09	1.04	109	100	-	-
FTGH	0.07	4.67%	1.57	1.50	4,540	2,900	-	-
UCHM	0.01	3.33%	0.31	0.30	4,787	15,300	-	-
SMER	0.09	2.64%	3.50	3.41	700	200	-	-
UNGA	0.70	2.41%	29.80	29.10	2,980	100	-	-
IMH	1.05	2.15%	50.00	48.95	175,300	3,500	-	-
UMME	0.14	2.00%	7.14	7.00	73,550	10,300	-	-
SCBK	3.25	1.95%	169.75	166.50	50,950	300	-	-
SGL	0.35	1.62%	22.00	21.65	4,400	200	-	-
SASN	0.25	1.42%	17.80	17.55	51,560	2,900	-	-
TCL	0.02	1.32%	1.54	1.52	13,131	8,500	-	-
SBIC	1.00	1.20%	84.25	83.25	42,125	500	-	-
DTK	0.75	1.07%	70.75	70.00	42,450	600	-	-
SLAM	-	0.00%	13.50	13.50	127,035	9,400	-	-
KEGN	-	0.00%	5.32	5.32	3,021,988	567,800	10,600	-
ARM	-	0.00%	5.55	5.55	-	-	-	-
BAMB	-	0.00%	28.00	28.00	271,600	9,700	-	243,600
BKG	-	0.00%	18.00	18.00	-	-	-	-
BOC	-	0.00%	57.50	57.50	5,750	100	-	-
CGEN	-	0.00%	22.70	22.70	-	-	-	-
CIC	-	0.00%	2.29	2.29	38,740	16,900	-	-
CRWN	-	0.00%	48.95	48.95	-	-	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
GLD	-	0.00%	1,800.00	1,800.00	-	-	-	-
KAPC	-	0.00%	83.00	83.00	-	-	-	-
KUKZ	-	0.00%	325.00	325.00	-	-	-	-
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LIMIT	-	0.00%	385.00	385.00	-	-	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
NBK	-	0.00%	4.12	4.12	-	-	-	-
NBV	-	0.00%	0.60	0.60	5,580	9,300	-	-
NMG	-	0.00%	15.40	15.40	315,730	20,500	-	-
OCH	-	0.00%	2.30	2.30	1,610	700	-	-
ORCH	-	0.00%	12.25	12.25	-	-	-	-
PORT	-	0.00%	12.60	12.60	20,160	1,600	-	-
SCAN	-	0.00%	16.50	16.50	47,850	2,900	-	-
TPSE	-	0.00%	14.40	14.40	-	-	-	-
WTK	-	0.00%	130.00	130.00	78,000	600	-	-
XPRS	-	0.00%	6.00	6.00	-	-	-	-
FAHR	-	0.00%	5.90	5.90	81,978	13,900	-	-
KCB	(0.05)	-0.14%	36.35	36.40	45,734,610	1,258,400	36,507,850	41,374,900
EGAD	(0.02)	-0.20%	9.90	9.92	10,890	1,100	-	-
BAT	(2.25)	-0.70%	317.75	320.00	1,017,100	3,200	-	-
NSE	(0.06)	-0.77%	7.74	7.80	1,095,168	141,400	31,120	983,398
LKL	(0.04)	-0.81%	4.90	4.94	56,322	11,500	-	-
TOTL	(0.20)	-0.81%	24.40	24.60	41,480	1,700	-	-
SCOM	(0.25)	-0.87%	28.65	28.90	238,342,520	8,318,800	44,526,155	216,959,190
ABSA	(0.10)	-0.99%	10.00	10.10	1,186,998	118,700	-	-
EGTY	(0.40)	-1.14%	34.70	35.10	8,162,825	235,400	6,900	3,832,475
NCBA	(0.35)	-1.30%	26.55	26.90	3,188,625	120,100	-	-
CTUM	(0.35)	-1.35%	25.55	25.90	465,320	18,200	-	-
COOP	(0.20)	-1.62%	12.15	12.35	1,926,985	158,900	-	-
HFCK	(0.09)	-2.00%	4.41	4.50	126,255	28,600	-	-
JUB	(5.00)	-2.02%	242.00	247.00	411,200	1,700	-	-
BRIT	(0.18)	-2.31%	7.62	7.80	305,156	40,000	-	-
KPLC	(0.06)	-3.03%	1.92	1.98	3,701,793	1,927,900	-	-
CARB	(0.28)	-3.17%	8.56	8.84	156,790	18,300	-	-
KNRE	(0.08)	-3.60%	2.14	2.22	1,319,291	615,900	-	-
EABL	(7.75)	-4.55%	162.50	170.25	42,847,075	263,500	32,892,950	39,687,300
HAFR	(0.02)	-4.65%	0.41	0.43	86,788	209,300	-	-
CABL	(0.12)	-5.45%	2.08	2.20	55,378	26,600	-	-



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