



Weekly Review

Week ended October 6th, 2023

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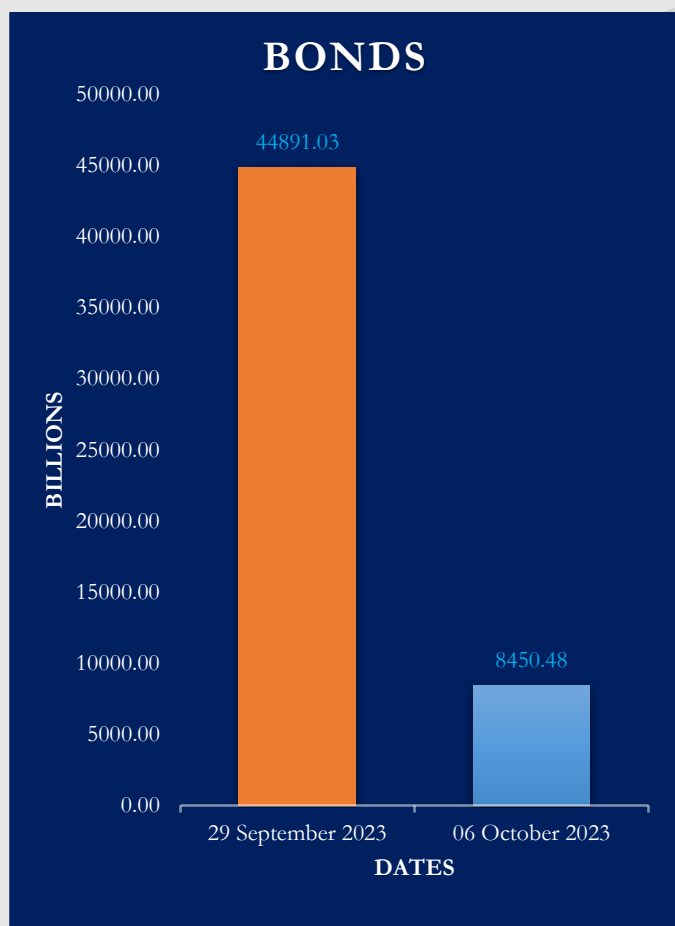
Key Market Indicators

Week ending	06-Oct-23	29-Sep-23	% Change
NSE 20 SHARE INDEX	1,490.98p	1,508.75p	-1.18%
NSE ALL SHARE INDEX	93.49p	95.22p	-1.82%
NSE 25 SHARE INDEX	2,454.85p	2,473.71p	-0.76%
EQUITY TURNOVER	1,119.03 M	513.46 M	+117.94%
MARKET CAPITALIZATION	1,460.71 B	1,487.67 B	-1.81%
EQUITY VOLUME	84.15 M	31.25 M	169.28%
BOND TURNOVER	8,450.48 M	44,891.03M	-81.18%

(Source: NSE, Suntra research)

Bonds Markets

- The bond market decreased by **81.18%** to close the week at **Kes. 8,450.48 Million** compared to **Kes 44,891.03 Million** traded the previous week.

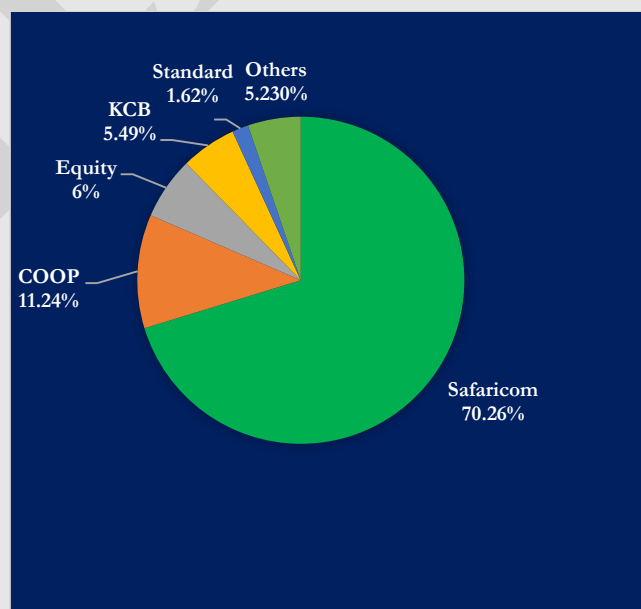


(Source NSE, Suntra research)

Equities Market

- During the week, the total market turnover of the top 5 companies was **Kes. 926.14 Million**, accounting for **93.15%** of the total turnover, as compared to last week's **Kes. 329.04 Million**, summing up to **64.08%** of the total turnover.
- The top five companies by market turnover were **Safaricom, COOP, Equity, KCB** and **Standard Chartered**.
- The Top Five's Total Turnover as a proportion of total market turnover decreased by **24.07%** from **64.08%** recorded in the previous week.

Top 5 by Market Turnover in Millions – 06th October 2023



(Source: NSE, Suntra Research)

- There was a downtrend performance in the past week where the **NSE 20** share index and **NSE 25** share index decreased by **1.18%** and **0.76%** respectively. **NSE ALL** share index also decreased by **1.82%** to close the week at **93.49 points** from **95.22 points** of the previous week.
- Equity Turnover for this week was **Kes 1,119.03 Million**, compared to **Kes 513.46 Million**

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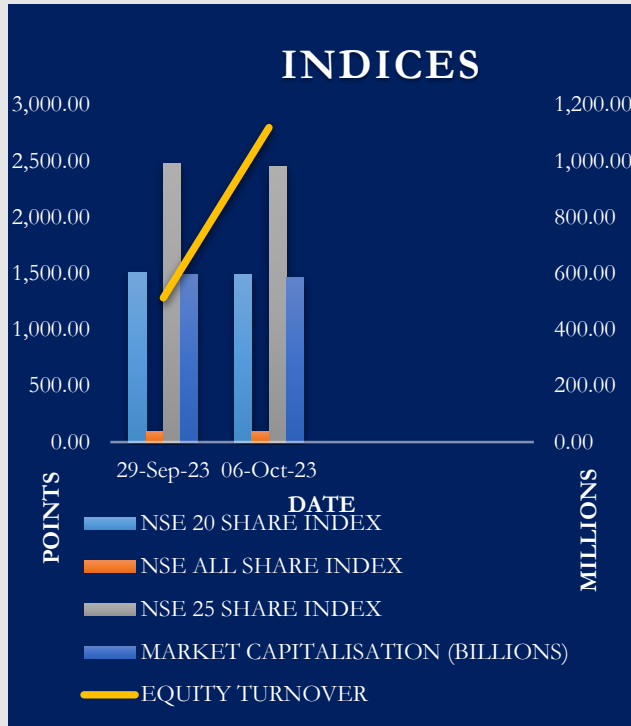
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recorded in the previous week, recording an increase of **117.94%**.

- There was a net flow of **Kes 44.22 Million** as compared to inflow of **Kes 20.78 Million** during the week.



(Source: NSE and Suntra Investment Analysis)

SECTOR PERFORMANCE

Agriculture

Williamson has registered an increase of **7.68%**. Its share price is currently at **Kes 220.75**. Kakuzi finished the week at **Kes 406**.

Banking

The banking sector transacted shares worth **Kes 288 Million** as compared to last week's **Kes 258.8 Million**, accounting for **25.75%** of the week's trade, an increase from last week's **50.42%**. **I & M** closed the week higher with a **5.28%** increase thus closing at a price of **Kes 17.95**.

Energy and petroleum

In the sector **Umeme** and **Kengen** closed at **Kes 13.3** and **Kes 2.3**, making an increase of **1.92%** and a constant move of **0.00%** respectively.

Manufacturing

The sector was mainly driven by **BAT** which went up by **0.66%**, to close the week at **Kes. 421**.

Telecommunications

Safaricom share price plunged by **4.11%** closing the week at **Kes 14**. Total shares traded also increased from a valuation of **Kes 151.1 Million** to **Kes 786.9 Million**.

(Source: NSE and Suntra Investment Analysis)

CORPORATE NEWS

- The value of bonds traded at the **NSE** have hit a 2-year high in the previous month ended of September. This is highly attributed by investors letting go of less performing bonds to get those with higher value. The bond turnover increased to **Kes 96.2 Billion** in September, down from **Kes 53.9 Billion** in August.

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**NEXT TREASURY BILLS ISSUE NOS. (2547/091), (2520/182) & (2473/364)
DATED 16/10/2023**

Tenor	91 Days	182 Days	364 Days
Amount Offered (Kes. M)	4,000	10,000	10,000
Auction Date & Bids date	12-Oct-23	12-Oct-23	12-Oct-23
Results Announcement	13-Oct-23	13-Oct-23	13-Oct-23
Previous Interest Rate	14.87%	14.98%	15.19%

(Source: NSE, Suntra Research)

CORPORATE ACTIONS

Company	Dividend Type	Amount	Books Closure	Payment Date
Jubilee	Interim	Kes 2.00	08-Sep-23	11-Oct-23
East African Breweries	Final	Kes 1.75	15-Sep-23	27-Oct-23
ABSA	Interim	Kes 0.20	21-Sep-23	12-Oct-23
Centum	Final	Kes 0.60	11-Oct-23	30-Nov-23
Umeme	Interim	Ushs 24	09-Feb-24	29-Feb-24

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WEEKLY EQUITIES SUMMARY

	Price	52 week high	52 week low	WoW Return	YTD
Sanlam	7.7	15	7.2	17.74% ▲	-13.68%
Longhorn	2.4	4.3	2	9.59% ▲	-20.53%
Williamson	220.75	199	120	7.68% ▲	41.28%
Kakuzi	406	450	240	5.45% ▲	5.45%
I&M	17.95	21.5	15.8	5.28% ▲	5.59%
Sameer	2.6	4.38	1.8	4.42% ▲	18.18%
NCBA Group	39.1	41	23.3	3.30% ▲	-1.76%
Equity	36.55	53.5	35	2.81% ▲	-19.67%
Crown paints	36.5	45	31.75	2.38% ▲	-3.95%
Kapchorua	204	145	81	2.00% ▲	95.68%
Transcentury	0.51	1.35	0.69	2.00% ▲	-53.21%
Umeme	13.3	16.45	6.3	1.92% ▲	76.39%
Diamond Trust	48.8	57	43.75	1.46% ▲	-11.67%
Jubilee	188	273	142	1.21% ▲	-6.00%
BAT	421	490	400	0.66% ▲	-8.33%
KCB	20.95	44	28.05	0.48% ▲	-46.35%
Centum	9.04	12.8	7.6	0.44% ▲	6.60%
Limuru Tea	380	510	320	0.00%	-9.52%
Car and General	25.65	49.75	24.3	0.00%	-45.43%
Nation Media	20	23	14	0.00%	25.39%
Kengen	2.3	3.88	2	0.00%	-28.35%
Liberty Kenya	3.6	7.48	3.6	0.00%	-21.57%
Kurwitu	1500	1500	1500	0.00%	0.00%
BOC Kenya	85	85	65	0.00%	19.72%
Carbacid	16	14.3	10.3	0.00%	29.03%
Flame Tree	1.26	1.45	0.9	0.00%	14.55%
Kenya Orchads	19.5	15	10.4	0.00%	87.50%
Stanbic	115	119	90	-0.22% ▼	5.75%
ABSA	11.9	13	9.02	-0.42% ▼	-1.24%
Kenya Re	1.76	2.3	1.5	-0.56% ▼	-7.37%
NSE	5.94	8.5	5.5	-1.33% ▼	-12.90%
EA portland	7.3	8.8	5.5	-1.35% ▼	-4.45%
Kenya power	1.43	2.11	1.3	-1.38% ▼	-12.27%
Coop Bank	11.6	14	10.3	-1.69% ▼	-5.69%
Total	17.6	26.4	17.3	-1.95% ▼	-26.51%
Olympia	3.38	3.7	1.91	-2.03% ▼	14.19%
Eaagads	13.7	14	10	-2.14% ▼	29.86%
BK group	35	36.95	26.5	-2.78% ▼	16.67%
Unga	17	35	15	-2.86% ▼	-45.16%
Stanchart	160.25	172.5	121	-2.88% ▼	2.72%

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EA cables	0.91	1.32	0.72	-3.19% ▼	-7.14%
HF Group	4.22	5	2.8	-3.21% ▼	36.13%
CIC	2.07	2.3	1.6	-3.27% ▼	11.89%
Safaricom	14	34	12.7	-4.11% ▼	-39.00%
Uchumi	0.2	0.29	0.16	-4.76% ▼	-13.04%
Scan Group	2.58	4.23	2.6	-5.15% ▼	-14.29%
EABL	124	190	110	-5.34% ▼	-28.01%
Eveready	1.28	1.88	0.59	-5.88% ▼	80.28%
Britam	4.69	7.5	4.01	-6.01% ▼	-11.51%
NBV	2.87	5.12	2.5	-6.82% ▼	-39.71%
Bamburi cement	22.8	39.5	22.4	-6.94% ▼	-24.88%
Home Afrika	0.31	0.41	0.27	-8.82% ▼	-6.06%
Standard	7.16	14.75	8.16	-9.02% ▼	18.08%
Serena	11.6	18	10.85	-9.02% ▼	-10.77%
Sasini	21.7	31.4	17.9	-9.96% ▼	-1.81%

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