



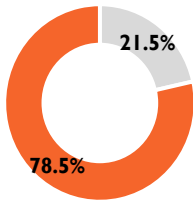
## AIB-AXYS Daily Market Watch – 5<sup>th</sup> November 2024

### Top Traded

| Company                | Closing Price | Turnover (KES Mn) |
|------------------------|---------------|-------------------|
| KCB Group              | 38.40         | 146.85            |
| BAT Kenya              | 350.25        | 129.84            |
| Equity Group           | 47.25         | 60.18             |
| East African Breweries | 184.00        | 55.86             |
| Co-operative Bank      | 14.10         | 38.30             |

Source: NSE, AIB-AXYS Research

### Participation Mix



■ Foreign Participation ■ Local Participation

Source: NSE, AIB-AXYS Research

### Top Gainers

| Company             | Closing Price | % Change |
|---------------------|---------------|----------|
| TPS Eastern Africa  | 13.80         | ▲ 10.0%  |
| Longhorn Publishers | 2.60          | ▲ 9.7%   |
| East African Cables | 1.09          | ▲ 7.9%   |
| Britam Holdings     | 5.90          | ▲ 7.3%   |
| Unga Group          | 16.60         | ▲ 7.1%   |

Source: NSE, AIB-AXYS Research

### Top Losers

| Company                     | Closing Price | % Change |
|-----------------------------|---------------|----------|
| HF Group                    | 4.00          | ▼ (8.0%) |
| Flame Tree Group            | 1.00          | ▼ (7.4%) |
| Crown Paints                | 32.30         | ▼ (6.8%) |
| Williamson Tea Kenya        | 236.25        | ▼ (5.5%) |
| East African Portland Cemei | 29.80         | ▼ (5.2%) |

Source: NSE, AIB-AXYS Research

### Equities Highlights

- The market registered mild bearish sentiments as signaled by the **0.2%** fall in the Nairobi All-Share index (NASI) to close at **116.76 points**.
- Trading activity soared **130.5%** in the day to **KES 580.38 Mn**, up from **KES 251.80 Mn** in the previous session.
- Local investors were more active in the day accounting for **78.5%** of total market trading activity.
- Foreign investors remained net sellers recording net outflows totaling **KES 70.69 Mn** compared to net outflows totaling **KES 105.46 Mn** recorded in the previous session.
- The top traded counters were **KCB Group, BAT Kenya and Equity Group** with turnovers clocking **KES 146.85 Mn, KES 129.84 Mn and KES 60.18 Mn**, respectively.

### Market Summary

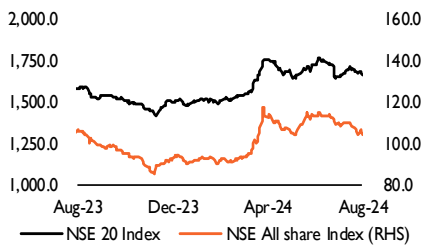
| Statistic                   | Today    | Previous | % change  |
|-----------------------------|----------|----------|-----------|
| Equity Turnover (KES, Mn)   | 580.38   | 251.80   | ▲ 130.5%  |
| Market Cap (KES Bn)         | 1,827.75 | 1,831.36 | ▼ (0.2%)  |
| Nairobi All-Share Index     | 116.76   | 116.99   | ▼ (0.2%)  |
| NSE-10 Index                | 1,233.18 | 1,231.70 | ▲ 0.1%    |
| NSE-20 Index                | 1,910.44 | 1,896.47 | ▲ 0.7%    |
| NSE-25 Index                | 3,181.84 | 3,171.57 | ▲ 0.3%    |
| Foreigner buys (KES Mn)     | 89.40    | 68.31    | ▲ 30.9%   |
| Foreigner sales (KES Mn)    | 160.09   | 173.78   | ▼ (7.9%)  |
| Net foreign flows (KES, Mn) | (70.69)  | (105.46) | ▼ (33.0%) |

Source: NSE, AIB-AXYS Research



## AIB-AXYS Daily Market Watch – 5<sup>th</sup> November 2024

### Equities Indices Trend



Source: CBK, NSE, AIB-AXYS Research

### Fixed Income Stats

| Statistic           | Today    | Previous | Δ          |
|---------------------|----------|----------|------------|
| Bond Turnover (Bns) | 6.20     | 8.01     | ▼ (22.6%)  |
| No. of trades       | 78       | 144      | ▼ (45.8%)  |
| Bond Index          | 1,014.94 | 1,011.76 | ▲ 0.3%     |
| 91-day rate         | 13.97%   | 14.43%   | ▼ (47 bps) |
| 182-day rate        | 14.52%   | 15.15%   | ▼ (62 bps) |
| 364-day rate        | 14.97%   | 15.47%   | ▼ (50 bps) |
| Interbank Rate      | 12.06%   | 12.10%   | ▼ (4 bps)  |

Source: CBK, NSE, AIB-AXYS Research

### Exchange Rates

| Currency        | Today  | Previous | % Change   |
|-----------------|--------|----------|------------|
| US Dollar       | 129.20 | 129.19   | ▼ (1 bps)  |
| Euro            | 140.54 | 140.78   | ▲ 18 bps   |
| Sterling Pound  | 167.45 | 167.87   | ▲ 25 bps   |
| Japanese Yen    | 84.73  | 85.07    | ▲ 39 bps   |
| Chinese Yuan    | 18.19  | 18.22    | ▲ 15 bps   |
| Indian Rupee    | 1.54   | 1.54     | ▲ 3 bps    |
| S. Africa Rand  | 7.38   | 7.31     | ▼ (99 bps) |
| KES/UG Shilling | 28.33  | 28.33    | ▼ (1 bps)  |
| KES/TZ Shilling | 20.82  | 20.86    | ▼ (19 bps) |

Source: CBK, AIB-AXYS Research

### Top Foreigner Buys

| Company                | Closing Price | Turnover (KES Mn) |
|------------------------|---------------|-------------------|
| East African Breweries | 184.00        | 55.22             |
| Stanbic Holdings       | 130.00        | 21.71             |
| BAT Kenya              | 350.25        | 5.60              |
| Equity Group           | 47.25         | 3.13              |
| Safaricom              | 16.45         | 1.35              |

Source: NSE, AIB-AXYS Research

### Top Foreigner Sales

| Company            | Closing Price | Turnover (KES Mn) |
|--------------------|---------------|-------------------|
| BAT Kenya          | 350.25        | 128.73            |
| KCB Group          | 38.40         | 25.13             |
| Kenya Re-Insurance | 1.10          | 2.40              |
| KenGen Plc         | 4.02          | 1.00              |

### Fixed Income

- Secondary bond market turnover decreased **22.6%** to **KES 6.20 Bn** from **KES 8.01 Bn** worth of bonds traded previously.
- The highest grossing bond of the day was the **FXD1/2020/5Yr** while the most frequently traded bond of the day was the **IFB1/2024/6.5Yr**.

### Derivatives

- Total value of contracts traded remained constant at **0** as recorded in the previous session. The volume of traded contracts remained constant at **0** as recorded in the previous session.
- The number of open interest contracts remained constant at **404** as recorded in the previous session.

### Summary Macroeconomic Stats

| Statistic                    | Updated as of: | Current | Previous | Δ           |
|------------------------------|----------------|---------|----------|-------------|
| GDP Growth                   | Q2 2024        | 4.6%    | 5.0%     | ▼ (40 bps)  |
| Headline Inflation           | September/24   | 3.6%    | 4.4%     | ▼ (80 bps)  |
| Central Bank Rate            | September/24   | 12.0%   | 12.8%    | ▼ (80 bps)  |
| Stanbic Kenya PMI            | October/24     | 50.4    | 49.7     | ▲ 0.7 pts   |
| Private Sector Credit Growth | August/24      | 1.3%    | 3.7%     | ▼ (240 bps) |
| Forex Reserves (USD M)       | September/24   | 8,027   | 7,503    | ▲ 7.0%      |
| Public Debt (KES Tn)         | June/24        | 10.56   | 10.438   | ▲ 1.2%      |

Source: CBK, KNBS, Stanbic Bank Kenya, AIB-AXYS Research





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