



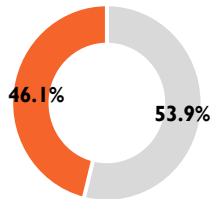
## AIB-AXYS Daily Market Watch – 13<sup>th</sup> November 2024

### Top Traded

Company	Closing Price	Turnover (KES Mn)
East African Breweries	193.00	75.48
Safaricom	15.30	45.79
KCB Group	39.40	41.43
Equity Group	49.45	11.27
NCBA Group	43.65	6.10

Source: NSE, AIB-AXYS Research

### Participation Mix



■ Foreign Participation ■ Local Participation

Source: NSE, AIB-AXYS Research

### Top Gainers

Company	Closing Price	% Change
East African Portland Cemei	43.05	▲ 10.0%
Total Kenya	21.65	▲ 4.6%
Olympia Capital Holdings	3.00	▲ 3.4%
Home Afrika	0.36	▲ 2.9%
Umeme	16.70	▲ 2.8%

Source: NSE, AIB-AXYS Research

### Top Losers

Company	Closing Price	% Change
Flame Tree Group	1.00	▼ (6.5%)
Uchumi Supermarkets	0.19	▼ (5.0%)
Williamson Tea Kenya	220.00	▼ (3.5%)
Unga Group	16.95	▼ (3.1%)
Sasini	15.70	▼ (2.8%)

Source: NSE, AIB-AXYS Research

### Equities Highlights

- The market registered bullish sentiments as signaled by the **0.4%** rise in the Nairobi All-Share index (NASI) to close at **115.68 points**.
- Trading activity increased **46.7%** in the day to **KES 204.51 Mn**, up from **KES 139.42 Mn** in the previous session.
- Foreign investors were more active in the day accounting for **53.9%** of total market trading activity.
- Foreign investors remained net sellers recording net outflows totaling **KES 8.14 Mn** compared to net outflows totaling **KES 49.63 Mn** recorded in the previous session.
- The top traded counters were **East African Breweries, Safaricom and KCB Group** with turnovers clocking **KES 75.48 Mn, KES 45.79 Mn and KES 41.43 Mn**, respectively.

### Market Summary

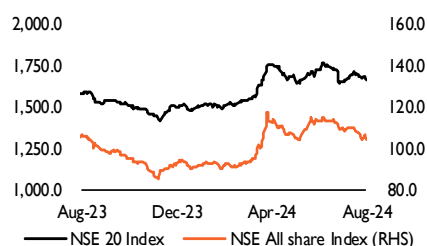
Statistic	Today	Previous	% change
Equity Turnover (KES, Mn)	204.51	139.42	▲ 46.7%
Market Cap (KES Bn)	1,810.85	1,803.30	▲ 0.4%
Nairobi All-Share Index	115.68	115.20	▲ 0.4%
NSE-10 Index	1,246.61	1,240.31	▲ 0.5%
NSE-20 Index	1,937.50	1,929.70	▲ 0.4%
NSE-25 Index	3,212.40	3,195.87	▲ 0.5%
Foreigner buys (KES Mn)	106.10	41.58	▲ 155.2%
Foreigner sales (KES Mn)	114.24	91.21	▲ 25.2%
Net foreign flows (KES, Mn)	(8.14)	(49.63)	▼ (83.6%)

Source: NSE, AIB-AXYS Research



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### Equities Indices Trend



Source: CBK, NSE, AIB-AXYS Research

### Fixed Income Stats

Statistic	Today	Previous	Δ
Bond Turnover (Bns)	3.38	7.72	▼ (56.3%)
No. of trades	100	135	▼ (25.9%)
Bond Index	1,018.56	1,014.94	▲ 0.4%
91-day rate	13.45%	13.97%	▼ (52 bps)
182-day rate	13.84%	14.52%	▼ (68 bps)
364-day rate	14.45%	14.97%	▼ (52 bps)
Interbank Rate	12.10%	12.13%	▼ (3 bps)

Source: CBK, NSE, AIB-AXYS Research

### Exchange Rates

Currency	Today	Previous	% Change
US Dollar	129.25	129.21	▼ (3 bps)
Euro	137.31	137.53	▲ 16 bps
Sterling Pound	165.48	166.28	▲ 48 bps
Japanese Yen	83.67	83.96	▲ 34 bps
Chinese Yuan	17.87	17.94	▲ 35 bps
Indian Rupee	1.53	1.53	▼ (7 bps)
S. Africa Rand	7.15	7.22	▲ 99 bps
KES/UG Shilling	28.43	28.35	▲ 30 bps
KES/TZ Shilling	20.58	20.59	▼ (3 bps)

Source: CBK, AIB-AXYS Research

### Top Foreigner Buys

Company	Closing Price	Turnover (KES Mn)
East African Breweries	193.00	75.37
KCB Group	39.40	16.46
Equity Group	49.45	10.42
Kenya Re-Insurance	1.10	3.24
Safaricom	15.30	0.36

Source: NSE, AIB-AXYS Research

### Top Foreigner Sales

Company	Closing Price	Turnover (KES Mn)
East African Breweries	193.00	65.08
Safaricom	15.30	41.20
Kenya Re-Insurance	1.10	5.24
KCB Group	39.40	0.88

### Fixed Income

- Secondary bond market turnover decreased **56.3%** to **KES 3.38 Bn** from **KES 7.72 Bn** worth of bonds traded previously.
- The highest grossing bond of the day was the **FXDI/2023/10Yr** while the most frequently traded bond of the day was the **IFBI/2023/6.5Yr**.

### Derivatives

- Total value of contracts traded increased to **339,800** up from **155,000** as recorded in the previous session. The volume of traded contracts increased to **13** up from **10** as recorded in the previous session.
- The number of open interest contracts decreased to **319** down from **328** 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	October/24	2.7%	3.6%	▼ (90 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)	October/24	9,323	8,027	▲ 16.1%
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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