



Daily Market Report 13th April, 2021.

Top Gainers

Company	(%)	Vol.
KAPC	9.88%	400
UMME	8.31%	6,900
TCL	6.80%	100
UNGA	6.34%	100
SMER	4.64%	5,400

(Source: NSE, AIB-AXYS)

Top Losers

Company	(%)	Vol.
CRWN	-7.58%	600
CIC	-7.42%	23,600
FTGH	-6.15%	700
SLAM	-4.35%	100
LKL	-4.24%	11,300

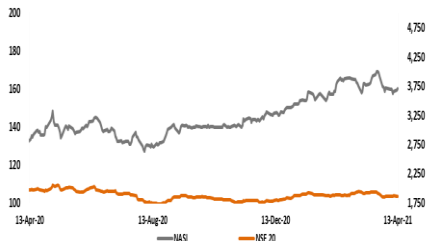
(Source: NSE, AIB-AXYS)

Top Movers

Company	Vol.
SCOM	8,410,100
EABL	2,009,100
BKG	1,500,100
KCB	764,500
EQTY	433,900

(Source: NSE, AIB-AXYS)

Market Index Movement



(Source: NSE, AIB-AXYS)

Currency

	Today	Previous	% A
USD/KES	107.10	107.29	0.18%
EUR/KES	127.61	127.64	0.02%
GBP/KES	147.35	147.23	-0.08%
JPY(100)/KES	97.95	97.81	-0.14%
YUAN/KES	16.36	16.36	0.01%
RUPEE/KES	1.43	1.44	0.65%
KES/UGS	33.94	33.97	0.10%
KES/TZS	21.65	21.61	-0.18%
RAND/KES	7.34	7.37	0.42%

(Source: NSE, AIB-AXYS)

Dear client,

Below are today highlights:

CURRENCY:

The shilling appreciated against the greenback to trade at **KES 107.10** in contrast to **KES 107.29** during the previous session. The shilling has remained under pressure since 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 April 8th, CBK's usable foreign exchange reserves stood at **USD 7,425 million (4.56 months of import cover)**.

MONEY MARKET:

The interbank rate increased to **4.80%** from **3.60 %**

EQUITIES:

Equity turnover at the NSE increased by **95.44%** to **KES 0.77Bn** from **KES 0.39Bn** recorded in the previous session. The top traders today were **EABL, SCOM** and **BKG**. The counters' turnover stood at **KES 341Mn**, **KES 308Mn** and **KES 37Mn** respectively. Foreign investors were net-sellers recording net outflows of **KES 0.03Bn** as compared to net outflows of **KES 0.11Bn** in the previous session. In terms of company specific foreign activity, foreigners were net-buyers on **EABL** and net-sellers on **SCOM** and **BKG**.

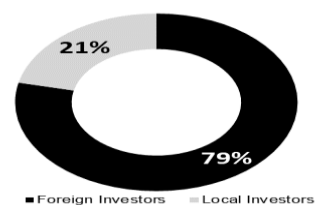
SUMMARY OF MARKET STATISTICS:

KES	Today	Previous	%	Trend	YTD
Equity Turnover	770,673,913	394,331,063	95.44	↑	153.69
Total Volume Traded	15,031,100	10,507,400	43.05	↑	40.87
Market Cap (Bn KES)	2,458.98	2,449.12	0.40	↑	(3.19)
Bond Turnover (Bn KES)	6.93	3.04	128.04	↑	14,206.80
NSE 20 Share Index	1,861.44	1,862.87	(0.08)	↓	(29.87)
NSE All Share Index	160.05	159.41	0.40	↑	(3.82)
FTSE NSE KENYA 15 Index	185.77	184.46	0.71	↑	(16.06)
FTSE NSE Kenya 25 Index	208.74	208.40	0.16	↑	(9.04)
FTSE NSE KENYA Gov't bond index	96.97	97.10	(0.13)	↓	(0.54)
Foreign buys (KES)	588,235,360	165,553,460	255.31	↑	139.33
Foreign Sales (KES)	622,542,579	275,602,417	125.88	↑	718.17

(Source: NSE, AIB-AXYS)



Foreign and Local Participation



(Source: NSE, AIB-AXYS)

Top Foreign Buys

Company	Vol.
EABL	340,395,100
SCOM	213,791,095
KCB	27,409,115
JUB	6,469,500
IMH	94,000

(Source: NSE, AIB-AXYS)

Top Foreign Sales

Company	Vol.
SCOM	300,557,840
EABL	255,859,200
BKG	37,500,000
KCB	17,297,180
EQTY	8,576,400

(Source: NSE, AIB-AXYS)

Top Traders (Ksh)

Top Traders (Ksh)	
EABL	341,043,475
SCOM	308,182,265
BKG	37,502,500
KCB	31,285,250
EQTY	16,508,255
BAT	7,626,475
JUB	6,469,500
COOP	5,062,585
NCBA	4,336,385
IMH	3,223,950
BAMB	2,916,320
SCBK	1,895,350
KNRE	685,168
KEGN	668,970
NBV	661,931

(Source: NSE, AIB-AXYS)

4-Day Key Market Indicators

Indicator	13-Apr-21	12-Apr-21	9-Apr-21	8-Apr-21
NSE 20	1861.44	1862.87	1868.76	1856.97
NASI	160.05	159.41	158.59	157.77
Market Cap (KES Bn)	2458.98	2449.12	2436.49	2423.90
Equity + I Reit turnover (KES Bn)	0.77	0.39	0.47	0.46
Bond Turnover (KES Bn)	6.93	3.04	0.78	1.38

(Source: NSE, AIB-AXYS)

FIXED INCOME MARKET:

Secondary bond market turnover was up, increasing by **128.04%** to **KES 6.93Bn** from **KES 3.04Bn** worth of bonds traded previously. The number of deals increased to **114** from **51** recorded in the previous session. The **IFB1/2021/16Yr** was today's most traded bond.

MACRO-ECONOMIC DATA.

Macroeconomic data	Current	Previous
GDP (3Q20 vs. 3Q19)	-1.10%	5.80%
Inflation (March)	5.90%	5.78%
Private sector credit growth (December)	8.40%	8.10%
Money Supply (December)	13.20%	14.20%
Forex reserves(USD M)	7,425	7,343
Public debt (B) (December)	7281.8	7254.5

GDP growth

Growth receded by **1.1%** in **3Q20** from **5.8%** in the corresponding period in 2019. The economic performance remained depressed due to the crisis caused by the pandemic. However, an improvement was observed when compared to **2Q20**. The quarterly improvement was majorly supported by growth in the agriculture sector that recorded **6.3%** growth compared to **5.0%** in 2019 and growth in construction by **16.2%** versus **6.6%** in 2019. Manufacturing, Electricity and Transportation sectors each recorded **3.2%**, **4.7%** and **9.9%** growth respectively.

Inflation

In March, Headline inflation stood at **5.90%** from **5.78%** in February. The CPI increased by **0.40%** from **113.37** in February to **113.81** in March. This increase occurred on the back of a rise in food and fuel prices. Meanwhile, the food and alcoholic beverages index increased by **0.35%** due to the increase in prices of select food items. Headline inflation is likely to increase on the back of higher food and fuel prices. Food prices are expected to edge higher due to the unfavorable weather conditions while increased economic activity has exerted upward pressure on global oil prices

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
KAPC	8.00	9.88%	89.00	81.00	35,600	400	-	-
UMME	0.54	8.31%	7.04	6.50	36,608	5,200	-	-
TCL	0.07	6.80%	1.10	1.03	110	100	-	-
UNGA	1.85	6.34%	31.05	29.20	3,105	100	-	-
SMER	0.16	4.64%	3.61	3.45	19,506	5,400	-	-
UCHM	0.01	4.55%	0.23	0.22	35,639	155,100	-	27,209
CARB	0.40	3.48%	11.90	11.50	1,190	100	-	-
NBV	0.14	3.28%	4.41	4.27	661,931	150,100	8,880	195,250
HAFR	0.01	2.63%	0.39	0.38	9,615	24,600	-	-
EABL	4.00	2.41%	169.75	165.75	341,043,475	2,009,100	340,395,100	255,859,200
CABL	0.03	2.33%	1.32	1.29	19,629	14,900	-	-
XPRS	0.08	2.04%	4.00	3.92	22,375	5,600	-	-
NCBA	0.25	0.99%	25.50	25.25	4,336,385	170,100	-	-
EQTY	0.35	0.93%	38.05	37.70	16,508,255	433,900	19,200	8,576,400
BRIT	0.06	0.86%	7.04	6.98	45,074	6,400	-	-
KCB	0.25	0.62%	40.90	40.65	31,285,250	764,500	27,409,115	17,297,180
EGAD	0.05	0.36%	13.95	13.90	26,500	1,900	-	-
SCBK	0.50	0.35%	143.50	143.00	1,895,350	13,200	-	-
IMH	0.15	0.32%	47.20	47.05	3,223,950	68,300	94,000	-
CTUM	0.05	0.31%	16.05	16.00	476,445	29,700	-	-
NMG	0.05	0.29%	17.00	16.95	64,600	3,800	-	-
SCOM	0.10	0.27%	36.65	36.55	308,182,265	8,410,100	213,791,095	300,557,840
TOTL	-	0.00%	24.20	24.20	278,200	11,500	14,700	-
ARM	-	0.00%	5.55	5.55	-	-	-	-
BKG	-	0.00%	25.00	25.00	37,502,500	1,500,100	-	37,500,000
BOC	-	0.00%	60.00	60.00	216,000	3,600	-	-
CGEN	-	0.00%	24.00	24.00	14,400	600	-	-
DCON	-	0.00%	0.45	0.45	-	-	-	-
DTK	-	0.00%	65.00	65.00	110,500	1,700	-	110,500
EVRD	-	0.00%	1.11	1.11	2,222	2,000	-	-
GLD	-	0.00%	1,855.00	1,855.00	-	-	-	-
HFCK	-	0.00%	4.00	4.00	4,800	1,200	-	-
JUB	-	0.00%	285.00	285.00	6,469,500	22,700	6,469,500	-
KEGN	-	0.00%	4.50	4.50	668,970	148,700	6,300	1,820
KQ	-	0.00%	3.83	3.83	-	-	-	-
KUKZ	-	0.00%	351.00	351.00	-	-	-	-
KURV	-	0.00%	1,500.00	1,500.00	-	-	-	-
LBTY	-	0.00%	8.10	8.10	2,430	300	-	-
LMT	-	0.00%	360.00	360.00	-	-	-	-
MSC	-	0.00%	0.28	0.28	-	-	-	-
NBK	-	0.00%	4.12	4.12	-	-	-	-
OCH	-	0.00%	2.29	2.29	-	-	-	-
ORCH	-	0.00%	10.40	10.40	-	-	-	-
SASN	-	0.00%	17.20	17.20	-	-	-	-
SBIC	-	0.00%	83.00	83.00	-	-	-	-
SGL	-	0.00%	20.95	20.95	-	-	-	-
WTK	-	0.00%	143.00	143.00	-	-	-	-
BAT	-	0.00%	470.75	470.75	7,626,475	16,200	-	-
ABSA	- 0.02	-0.23%	8.86	8.88	421,388	47,600	-	1,800
COOP	- 0.05	-0.42%	11.80	11.85	5,062,585	429,200	17,700	37,120
PORT	- 0.04	-0.50%	8.00	8.04	40,800	5,100	-	-
TPSE	- 0.10	-0.58%	17.00	17.10	73,100	4,300	-	-
KPLC	- 0.01	-0.74%	1.35	1.36	174,906	129,600	4,020	-
NSE	- 0.12	-1.43%	8.28	8.40	121,710	14,700	-	-
BAMB	- 0.55	-1.43%	37.85	38.40	2,916,320	77,000	-	2,341,720
SCAN	- 0.10	-1.80%	5.46	5.56	133,318	24,400	-	-
KNRE	- 0.06	-2.41%	2.43	2.49	685,168	281,700	5,750	-
FAHR	- 0.24	-3.97%	5.80	6.04	26,072	4,500	-	-
LKL	- 0.18	-4.24%	4.07	4.25	46,018	11,300	-	-
SLAM	- 0.50	-4.35%	11.00	11.50	1,100	100	-	-
FTGH	- 0.08	-6.15%	1.22	1.30	853	700	-	-
CIC	- 0.17	-7.42%	2.12	2.29	49,987	23,600	-	36,540
CRWN	- 3.20	-7.58%	39.00	42.20	23,400	600	-	-



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