

# DYER & BLAIR INVESTMENT BANK

## DAILY MARKET REPORT

Founder Member of the Nairobi Securities Exchange

13<sup>th</sup> March 2020



**DYER & BLAIR**  
INVESTMENT BANK

WE KNOW. YOU KNOW.

### CURRENCY PERFORMANCE-KES

|         | Close  | 1-day | y-t-d  |
|---------|--------|-------|--------|
| KES/USD | 102.42 | 0.05  | (1.07) |
| KES/GBP | 129.65 | 2.32  | 2.48   |
| KES/EUR | 115.09 | 1.05  | (1.52) |

### KENYAN EQUITY MARKETS

| Equity Indices | Close    | 1-day  | y-t-d   |
|----------------|----------|--------|---------|
| NASI           | 133.66   | (5.51) | (19.68) |
| NSE-20         | 2,124.78 | (5.01) | (19.95) |
| NSE-25         | 3,337.61 | (5.94) | (18.61) |
| FTSE 15        | 180.55   | (5.88) | (18.42) |
| FTSE 25        | 184.10   | (5.84) | (19.78) |

| Market Activity           | Close | 1-day | y-t-d  |
|---------------------------|-------|-------|--------|
| Market Cap (USD BN)*      | 19.94 | 21.11 | 25.06  |
| Market Turnover (USD MN)  | 11.50 | 18.05 | 334.49 |
| Foreign Buys (%)          | 15.81 | 29.67 | 49.89  |
| Foreign Sales (%)         | 91.07 | 60.20 | 69.54  |
| Foreign Participation (%) | 53.44 | 44.94 | 59.72  |

| Top Gainers            | VWAP  | 1-day  | Volumes       |
|------------------------|-------|--------|---------------|
|                        | (KES) | ch (%) | ('000 shares) |
| Liberty Kenya          | 7.64  | 8.83   | 11,000        |
| Sasini Plc             | 16.50 | 7.84   | 10,100        |
| Stanlib Fahari I-REIT. | 8.80  | 4.76   | 14,300        |

| Top Losers       | VWAP   | 1-day   | Volumes       |
|------------------|--------|---------|---------------|
|                  | (KES)  | ch (%)  | ('000 shares) |
| E.A.Cables       | 1.71   | (10.00) | 2,800         |
| Sanlam Kenya     | 13.95  | (10.00) | 1,000         |
| Jubilee Holdings | 302.50 | (9.70)  | 200           |

| Top Traders       | Turnover | F.buys  | F.sales | VWAP   | 1-day  |
|-------------------|----------|---------|---------|--------|--------|
|                   | (USD mn) | (USD m) | (USD m) | (KES)  | ch (%) |
| Safaricom         | 7.12     | 0.91    | 6.97    | 24.35  | (5.44) |
| KCB Group         | 2.90     | 0.06    | 2.61    | 42.65  | (6.98) |
| Equity Group      | 0.82     | 0.50    | 0.60    | 41.90  | (7.10) |
| EA Breweries      | 0.27     | 0.26    | 0.27    | 185.00 | (3.77) |
| Co-operative Bank | 0.11     | 0.00    | 0.00    | 13.25  | (7.02) |

\*Year-to-date refers to Market Capitalization as at 31st December 2019

### CURRENCY PERFORMANCE-TSH, USh, RWF

|         | Close    | 1-day  | y-t-d  |
|---------|----------|--------|--------|
| KES/USH | 36.27    | (0.13) | (0.29) |
| KES/RWF | 9.29     | (0.05) | 0.67   |
| KES/TSH | 22.49    | (0.05) | 0.85   |
| USD/USH | 3,715.00 | (0.08) | (1.36) |
| USD/RWF | 951.84   | (0.00) | (0.40) |
| USD/TSH | 2,303.00 | 0.00   | (0.22) |

### EAC EQUITY MARKETS

| Equity Indices | Close    | 1-day  | y-t-d  |
|----------------|----------|--------|--------|
| USE ALSI       | 1,633.13 | (3.34) | (9.31) |
| USE LCI        | 341.28   | (0.12) | (2.56) |
| RSE RSI        | 122.15   | -      | (1.01) |
| RSE RASI       | 150.21   | -      | 10.79  |
| DSE DSEI       | 2,028.14 | 0.77   | (1.51) |
| DSE TSI        | 3,513.86 | -      | 2.41   |

| RSE | Turnover (KES MN) | VWAP (KES) | VWAP (L.C)* | 1-day ch (%) |
|-----|-------------------|------------|-------------|--------------|
| BOK | -                 | 27.98      | 260.00      | -            |
| BLR | -                 | 14.96      | 139.00      | -            |
| CTL | -                 | 7.53       | 70.00       | -            |
| IMR | -                 | 9.58       | 89.00       | -            |

| DSE ** |            |       |          |      |
|--------|------------|-------|----------|------|
| CRDB   | 46,119.43  | 7.56  | 170.00   | 0.00 |
| DSE    | 2,739.59   | 39.14 | 880.00   | 0.00 |
| NICO   | 10,584.79  | 7.56  | 170.00   | 0.00 |
| TPCC   | 324,152.44 | 97.84 | 2,200.00 | 0.00 |
| VODA   | 37.80      | 37.80 | 850.00   | 0.00 |

\*Local Currency

\*\*Trading data for the previous day.

### UPCOMING EARNINGS

- Standard Chartered is scheduled to release its FY19 results on 19.03.2020

**RESEARCH DEPARTMENT**

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## **SALIENT NEWS**

### **NSE Market Halt on March 13, 2020**

The NSE was halted today at 2:38pm following a drop higher than 5.0% (from the opening value) of the NSE 20 Share Index during the continuous session. This is as per provided in the NSE Equity Trading Rules. Normal market activity will resume on Monday 16, March 2020. (*Source: NSE, DBIB Research*)