

# Daily Market Note

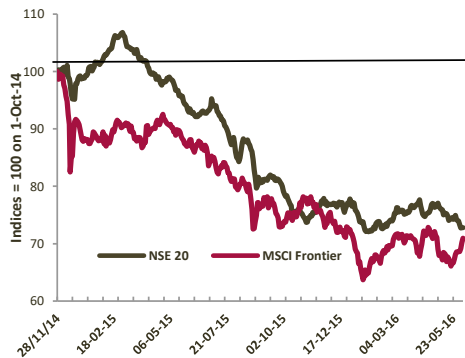
11-Oct-2017

## NSE 20

-1.41%

3,644.80  
-51.97

TMT KES 806.4M  
Vol 20.06M  
FP 80.0%  
NFP KES 82.4M  
PER 12.86  
DY 4.05%



Stock	11-Oct	10-Oct	Δ %	Vol. [#k]
C&G	17.60	16.00	10.0	0.5
TCL	6.40	6.00	6.7	1.7
UNGA	32.00	31.00	3.2	0.1
FAHR	10.70	10.55	1.4	21

Stock	11-Oct	10-Oct	Δ %	Vol. [#k]
NBV	1.80	2.00	-10.0	7.2
WTK	150.00	164.00	-8.5	152.6
SASN	25.00	26.75	-6.5	3.7
CABL	5.30	5.60	-5.4	5.3

Stock	Val[KES M]	Vol. [#k]	Share	LCP
SCOM	268.3	10,732	33.3%	25.00
ARM	39.4	3,032.1	4.9%	13.00
EQTY	71.9	2,010.9	8.9%	35.75
COOP	11.6	705.4	1.4%	16.50

Mkt Indices	11-Oct	10-Oct	Δ Day	Δ YTD
NSE 20	3,644.80	3,696.77	-1.4%	14.4%
SPSS XAU	465.17	461.94	0.7%	22.6%
NASI	159.78	160.85	-0.7%	19.8%
Mkt Cap	2,340.97	2,356.72	-0.7%	21.2%

FX/KES	11-Oct	10-Oct	Δ Day	Δ YTD
USD	103.23	103.27	0.0%	0.7%
GBP	136.13	135.72	0.3%	8.5%
EUR	121.79	121.15	0.5%	13.8%
JPY (100)	92.01	91.63	0.4%	5.7%

## Market Highlights

Activity surged this session posting a high TMT of KES 806.4M in a foreign dominated session [FP: 80.0%] that saw 20.1M shares exchange hands. The blue-chip NSE 20 declined 1.4% while the broad NASI dropped 0.7%.

Foreign investors turned net buyers, posting a net inflow of KES 82.4M. Foreign buying was focused on ARM [NFP: 38.2M] at KES 13.00 (-1.9%), SCBK [NFP: KES 37.9M] at KES 227.00 (unch) and SCOM [NFP: KES 23.6M] at KES 25.00 (unch). On the other hand, WTK [NFS: KES 22.6M] at KES 150.00 (-8.5%), EQTY [NFS: KES 9.9M] at KES 35.75 (-2.1%) and KENO [NFP: KES 1.6M] at KES 15.00 (-2.6%) posted foreign outflows.

SCOM (KES 25.00, unch) moved 10.7M shares in an intraday range of KES 24.75 - 25.25 followed by ARM (KES 13.00, -1.9%) which traded 3.0M shares in an intraday range of KES 30.75 - 39.00 to lead sector volume. EQTY (KES 35.75, -2.1%) exchanged 2.0M shares in an intraday range of KES 35.25 - 37.00 to lead banking sector volume while COOP (KES 16.50, unch) traded 705.4k shares.

C&G (KES 17.60, +10.0%) and TCL (KES 6.40, +6.7%) led the gainers, while NBV (KES 1.80, -10.0%) and WTK (KES 150.00, -8.5%) led the laggards.

Key:

LCP = Last Close Price; Δ = Change; YTD = Year to Date; TMT = Total Market Turnover; FP = Foreign Participation; NFP = Net Foreign Purchases; FB = Total Foreign Purchases; FS = Total Foreign Sales; PER = Price-Earnings Ratio; DY = Div. Yield

Foreign	11-Oct	Δ YTD	TO [KES M]	FP FP	NFP [KES M]	FB [KES M]	FS [KES M]
Market	806	80.0%	82.4	686.0	603.6		
ARM	13.00	-49.0%	39.4	48.5%	38.2	38.2	0.0
SCBK	227.00	20.1%	45.4	41.8%	37.9	37.9	0.0
SCOM	25.00	30.5%	268.3	90.4%	23.6	254.3	230.7
WTK	150.00	-15.7%	22.9	49.4%	-22.6	0.0	22.6
EQTY	35.75	19.2%	71.9	47.1%	-9.9	28.9	38.8
KENO	15.00	0.7%	2.0	40.3%	-1.6	0.0	1.6

Stock	11-Oct	10-Oct	Δ Day	Δ YTD	PER	L — 52-Wk — H
BBK	9.60	9.95	-3.5%	5.5%	7.1x	
DTK	183.00	185.00	-1.1%	55.1%	7.5x	
EQTY	35.75	36.50	-2.1%	19.2%	7.8x	
KCB	37.75	39.00	-3.2%	31.3%	5.8x	
SCBK	227.00	227.00	0.0%	20.1%	6.8x	
COOP	16.50	16.50	0.0%	25.0%	7.1x	
BAMB	176.00	176.00	0.0%	10.0%	12.1x	
BAT	809.00	800.00	1.1%	-11.0%	19.1x	
EABL	245.00	246.00	-0.4%	0.4%	21.7x	
SCOM	25.00	25.00	0.0%	30.5%	26.3x	

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