

PRESS RELEASE

city of Almaty

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KASE presents the performance of the stock exchange market for October 2023

Kazakhstan Stock Exchange JSC (hereinafter – KASE, the Exchange) informs about the main results of its activities for October 2023:

- The total volume of trading on KASE in October 2023 amounted to 42.8 trln tenge, having decreased relative to September by 8.2 %, or 3.8 trln tenge.
- Based on the results of October, KASE Index decreased by 1.7 % to 4,035.12 points.
- The capitalization of the equity market decreased by 2.6 % to 26.3 trln tenge, with the volume of traded corporate debt increasing by 0.3 % to 13.8 trln tenge.
- As of November 1, 2023, KASE's trading lists featured corporate securities of 622 names of 226 issuers.
- As of November 1, 2023, there were 685.3 th. personal accounts of individuals in the Central Depository. Based on the results of October, individuals registered 5,906 new personal accounts.

KEY PROJECTS AND EVENTS

In October 2023, KASE participated in the organization of the following events.

Training events

- KASE held a fair of Kazakh brokers "KASE FEST" at the premises of leading universities in 5 cities of Kazakhstan in support of the annual World Investor Week 2023 program of the World Federation of Stock Exchanges (WFE), the "Ring the Bell for Financial Literacy" ceremony and the offering of KEGOC common shares as part of the SPO;
- KASE held the second stage of educational trading within the framework of the 15th anniversary training project "Stock Exchange Simulator" to improve the financial literacy of students at universities in Kazakhstan;
- KASE organized a competition among retail investors on the stock market for existing investors.

International cooperation

- KASE hosted a meeting with representatives of the participating countries of the Central Asian Regional Economic Cooperation (CAREC) of the Asian Development Bank. The meeting participants got acquainted with the exhibition of the Exchange Museum, learned about the process of launching and conducting trading on KASE, as well as about the role of KASE in the country's financial system, the infrastructure and financial instruments of the Exchange, trends in the stock exchange market, projects implemented and KASE's plans under the Development Strategy for 2022-2024 years.
- Chairperson of KASE's Management Board A. Aldambergen took part:
 - in the United Nations Sustainable Stock Exchanges Initiative Global Dialogue within the framework of the UNCTAD's 8th World Investment Forum 2023 in Abu Dhabi, during which she highlighted the progress of KASE's implementation of UN SSE initiatives;
 - in the session "Financial Market of Kazakhstan. Infrastructure and Regulation" of the VI Conference Capital Markets Kazakhstan, where she shared information about the importance

of KASE's contribution to the economy of Kazakhstan as the center of capital market infrastructure, about trends in the stock exchange market and the development of KASE's IT infrastructure, about the increasing activity of retail investors and raising SME financing on KASE, as well as promoting ESG principles and implementing projects within the framework of KASE's Development Strategy for 2022-2024.

EQUITY MARKET

Based on the results of October 2023, the equity market capitalization amounted to 26.3 trln tenge (55.7 bn USD), which is 706.3 bn tenge, or 2.6 % lower than the same indicator of the previous month. The decrease was mainly due to changes in the price of index shares.

As of the end of October, shares of 99 names of 84 issuers were on the trading lists of KASE, of which shares of two names of two issuers were admitted to circulation in the "Unlisted securities" sector. In the reporting month, common and preferred shares of ALTYN SAMRUK QAZAQSTAN JSC were included in the alternative market of KASE official list. In October, common shares of First Heartland Securities JSC were excluded from KASE official list at the initiative of their issuer.

The volume of trading in shares in October amounted to 27.2 bn tenge, having decreased by 55.4 %, or 33.8 bn tenge, compared to September. At the same time, the number of transactions increased by 28.8 % to 82,597. The average daily trading volume amounted to 1,296.9 mln tenge (in the secondary market – 646.8 mln tenge), the average daily number of transactions – 3,933 (in the secondary market – 3,933 transactions), the average volume of one transaction – 329.7 th. tenge (on the secondary market – 164.5 th. tenge).

The volume of the primary market is estimated at 13.7 bn tenge. In October 2023, Phystech II JSC placed 13.7 mln common shares at a price of 1,000.00 tenge per share for an amount of 13.7 bn tenge. KEGOC JSC placed 2,631 common shares at a price of 1,482.00 tenge by exercising the right of pre-emptive purchase of shares under the SPO in the amount of 3.9 mln tenge.

On the secondary market in October, trading volume amounted to 13.6 bn tenge, which is 77.7 %, or 47.4 bn tenge, lower than the September figures.

Among the main categories of investors in the secondary market, individuals accounted for 48.7 % of the total volume of transactions in shares, banks – for 6.9 %, broker-dealer organizations – for 14.3 %, other institutional investors – for 7.5 %, other legal entities – 22.6 %. The share of non-residents was 13.7 %.

KASE INDEX

KASE Index value in October decreased by 1.7 % and by the end of the month amounted to 4,035.12 points.

The volume of transactions with index shares in October 2023 amounted to 12.7 bn tenge, which is 78.9 %, or 47.5 bn tenge, less than in September 2023. The largest trading volume fell on common shares of NC KazMunayGas JSC – 5,209.5 mln tenge (41.1 % of the total trading volume with index shares).

Changes in prices of shares included in KASE representative list

Issuer	Trade code	Price, tenge per share			Trading volume, mln tenge		
		as of 01.11.23	as of 01.10.23	Δ, %	October	September	Δ
Bank CenterCredit JSC	CCBN	835.00	730.00	+14.4	841.9	145.1	+696.8
KazTransOil JSC	KZTO	864.86	831.49	+4.0	2,365.5	2,004.2	+361.3
KEGOC JSC	KEGC	1,530.15	1,489.75	+2.7	428.2	154.7	+273.5
Halyk Bank of Kazakhstan JSC	HSBK	149.60	151.00	-0.9	814.5	2,551.1	-1,736.6
Kcell JSC	KCEL	1,945.00	1,991.86	-2.4	838.9	1,833.6	-994.7
Kaspi.kz JSC	KSPI	45,096.00	46,299.00	-2.6	441.4	569.2	-127.8

NC KazMunayGas JSC	KMGZ	11,400.00	11,857.94	-3.9	5,209.5	16,726.9	-11,517.5
NAC Kazatomprom JSC	KZAP	18,398.00	19,500.00	-5.7	1,199.9	2,033.8	-833.9
Kazakhtelecom JSC	KZTK	31,500.00	33,537.05	-6.1	538.0	34,112.40	-33,574.5

Based on the results of the month, the growth leader were shares of Bank CenterCredit JSC with a result of 14.4 %. In October, the bank's shares did not close a single trading session in the red. This year, international rating agencies simultaneously increased the ratings of BCC: SP Global Ratings to BB- outlook "Stable", Moody's – to Ba3 "Positive".

In second place in terms of growth rates, based on the results of the month, are shares of KazTransOil JSC with a result of 4.0 %. On October 13, the company reported an increase in the volume of oil transported separately through the main oil pipeline system over the nine months of this year by 8 % to 32.4 mln tons. Work continues to diversify export directions by country: the export of Kazakh oil from the port of Aqtau increased by 53 %, 589.6 th. tons of oil were supplied to Germany this year, and 79.7 th. tons of Russian oil were transported to the territory of the Republic of Uzbekistan.

KEGOC JSC closes the top three leaders in the reporting month with an increase of 2.7 %. Throughout the month, orders for participation in the company's SPO were collected. From September 28 to October 27, orders were collected under the preemptive purchase right from existing shareholders, and from October 16 to November 2, orders were collected under the public offering of common shares. On November 7, a decision was made to execute the orders, and on November 9, settlement of the orders was made. In total, as part of the SPO, the company offered to issue 15.3 mln shares at a price of 1,482.00 tenge per share and raised 22.7 bn tenge. Funds from the SPO will be used to strengthen the power grid of the Southern Zone of Kazakhstan's UES.

Common shares of Kaspi.kz JSC finished the month with a decrease of 2.6 %. On October 20, Kaspi.kz JSC reported results for the nine months of 2023, according to which net profit increased by 50 % YoY. The main income-generating areas were marketplace and fintech services. Kaspi.kz also notified of filing an application with the US Securities Commission regarding the offering of securities on the American exchange. A new, sixth, GDR buyback program worth \$100 mln has been announced.

On October 27 "National Company "KazMunayGas" JSC published operating results for the nine months of 2023. Compared to the same period last year, oil and gas production increased by 9.0 % and 17.9 %, respectively, oil transportation increased by 7.8 %, hydrocarbon processing at Kazakh refineries decreased by 1.3 %. Despite the positive operating report, the price of the company's securities fell by 3.9 % over the month against the backdrop of falling oil prices.

Common shares of NAC Kazatomprom JSC decreased in price by 5.7 %, despite the positive news background. The company provided operating results for the nine months of 2023: production volume decreased by 1 % to 15.3 th. tons, sales volume decreased by 8 % to 13.3 th. tons, while the selling price increased by 13 % to \$48.3 per pound. The company also revised its revenue forecasts by the end of 2023 upward from 1.3 to 1.4 trln tenge.

KASE GLOBAL SECTOR

As of the end of October 2023, the KASE Global sector contained 54 securities of 52 foreign issuers, including 45 shares and 9 ETFs of foreign issuers.

During the reporting month, transactions were concluded in the KASE Global sector for a total amount of 3.1 bn tenge. Compared to September, trading volume increased by 12.3 %, or 0.3 bn tenge, while the number of transactions decreased by 0.6 %. The average daily trading volume was 145.5 mln tenge, the average daily number of transactions was 231, the average volume of one transaction was 629.9 th. tenge.

At the end of the month, the largest volume of transactions fell on the following shares:

- Apple Inc. – 361 transactions for a total amount of 2.0 bn tenge;
- Tesla, Inc. – 385 transactions for a total amount of 119.3 mln tenge;
- Occidental Petroleum Corp. – 6 transactions for a total amount of 117.6 mln tenge.

Among the main categories of investors, brokerage-dealer organizations accounted for 44.6 %, other legal entities – for 34.1 %, and individuals – for 21.3 % of the total volume of transactions. Non-resident participation was 0.6 %

CORPORATE BONDS

The volume of corporate debt traded on KASE in October 2023 increased by 0.3 %, or 38.0 bn tenge, to 13.8 trln tenge (29.2 bn USD).

As of the end of October 2023, KASE official list included 383 issues of corporate bonds of 95 issuers. In October 2023, nine issues of corporate bonds of eight issuers (five new ones) were included in KASE official list: one issue each of Birinshi Lombard LLP, Capital Leasing Group LLP, **KazWind Energy LLP, ALTYN SAMRUK QAZAQSTAN JSC, Start Industries LLP, Emir Qurylys Astana LLP, Saulet Construction Astana LLP** and two issues of Microfinance Organization aFinance LLP.

In October 2023, five issues of corporate bonds of five issuers were excluded from KASE official list: one issue each of Eurasian Bank JSC and a subsidiary of VTB Bank JSC (Kazakhstan) due to the expiration of the circulation period, one issue of international bonds of UzAuto Motors JSC, Uzbek National Bank JSC and MFO "TAS FINANCE GROUP" LLP.

The value of KASE_BMY corporate bond yield index in October 2023 increased by 11 basis points to 14.53 % per annum.

The volume of trading in corporate bonds on KASE decreased relative to September by 83.1 %, or 434.2 bn tenge to 88.4 bn tenge. The average daily trading volume amounted to 4.2 bn tenge (in the secondary market – 3.2 bn tenge), the average daily number of transactions – 190 transactions (in the secondary market – 182 transactions), the average volume of one transaction – 22.1 mln tenge (in the secondary market – 17.8 mln tenge).

In October 2023, the volume of the primary corporate bond market amounted to 20.3 bn tenge, which is 95.4 %, or 420.8 bn tenge, lower than in September 2023:

- Kazakhstan Sustainability Fund JSC raised 10.0 bn tenge by placing bonds with a yield to maturity of 14.75-14.85 % per annum with a maturity of less than a year;
- Altyn Sapa ALM LLP raised 3.0 bn tenge by placing bonds with a yield to maturity of 25 % per annum and a maturity of 1.9 years;
- Capital Leasing Group LLP raised 3.0 bn tenge by placing three-year bonds at 21.50 % per annum;
- KazWind Energy LLP raised 3.0 bn tenge by placing five-year bonds at 21.75 % per annum;
- Birinshi Lombard LLP raised 1.0 bn tenge by placing two-year bonds at 24.00 % per annum.

In terms of the main categories of investors in the primary corporate bond market, the share of banks was 49.4 %, that of broker-dealer organizations – 2.0 %, that of other institutional investors – 10.4 %, that of other legal entities – 4.1 %, that of individuals – 34.1 %. The share of non-residents in the primary corporate bond market was 15.6 %.

The trading volume on the secondary bond market compared to September 2023 decreased by 16.5 %, or by 13.5 bn tenge, to 68.1 bn tenge.

In terms of the main categories of investors in the secondary corporate bond market, the share of banks was 21.6 %, that of broker-dealer organizations – 4.4 %, that of other institutional investors – 7.5 %, that of other legal entities – 52.2 %, that of individuals – 14.3 %. The share of non-residents was 28.0 %.

GOVERNMENT SECURITIES (GS)

The amount of government debt at par traded on KASE amounted to 26.3 trln tenge (55.8 bn USD), having increased by 3.2 %, or 821.2 bn tenge, in October.

The total trading volume of government securities on KASE amounted to 456.8 bn tenge, having decreased compared to September by 3.5 %, or 16.4 bn tenge. At the end of October 2023, the average daily trading volume amounted to 21.8 bn tenge (on the secondary market – 13.0 bn tenge), the average daily number of transactions – 14 (on the secondary market – 10), the average volume of one transaction – 1.6 bn tenge (on the secondary market – 1.3 bn tenge).

The trading volume on the primary government securities market increased by 6.3 %, or 10.9 bn tenge, to 183.6 bn tenge. Of these, 15.2 bn tenge were raised by the akimdiks of four regions (in order to finance activities provided for in the framework of the implementation of state programs). The Ministry

of Finance raised 168.4 bn tenge with a weighted average yield of 12.04-14.00 % per annum (at 12.00-14.00 %), placing bonds with a maturity of 1.3 to 11.4 years.

In terms of the main categories of investors in the primary market, banks accounted for 47.7 %, broker-dealer organizations – for 4.3 %, other institutional investors – for 34.7 %, and other legal entities – for 13.4 %. Non-residents did not participate in the primary government securities market.

Trading volume on the secondary market decreased by 9.1 %, or 27.3 bn tenge, having amounted to 273.3 bn tenge. The share of trading in the National Bank's notes on the secondary market amounted to 62.8 %, or 171.6 bn tenge, of the total trading volume, the share of MEKAM was 35.6 %, or 97.3 bn tenge, the share of Eurobonds of the Republic of Kazakhstan was 0.4 %, or 1.0 bn tenge. The remaining volume, amounting to 1.2 %, or 3.3 bn tenge, came from transactions with government securities of foreign countries (bonds of the U.S. Department of the Treasury, Türkiye and the Republic of Austria).

In terms of the main categories of investors in the secondary market, banks accounted for 37.9 %, broker-dealer organizations – for 9.2 %, other institutional investors – for 13.1 %, and other legal entities – for 38.2 %, individuals – for 1.7 %. The participation of non-residents is estimated at 17.4 %.

BONDS OF INTERNATIONAL FINANCIAL ORGANIZATIONS (IFOs)

As of the end of October, the trading lists of KASE included bonds of 57 issues of five international financial organizations: 27 issues of the Eurasian Development Bank, 16 issues of the European Bank for Reconstruction and Development, 11 issues of the Asian Development Bank, two issues of the International Finance Corporation and one issue of the Islamic Corporation for the Development of the Private Sector.

For October 2023, one issue of bonds of the European Bank for Reconstruction and Development was included in KASE official list. In October, one issue of bonds of the Eurasian Development Bank was excluded from the "Securities of International Financial Organizations" sector due to the expiration of the circulation period.

In October, the volume of trading in bonds of international financial organizations increased by 4.3 bn tenge compared to the previous month and amounted to 12.3 bn tenge. The average daily trading volume was 0.6 bn tenge, the average daily number of transactions was one, the average volume of one transaction was 0.9 bn tenge.

On the primary market, the Eurasian Development Bank raised 9.9 bn tenge by placing one bond issue with a yield of 16.20 % per annum and a maturity of 28 days. The entire placement volume fell on legal entities.

In October 2023, the volume of trading in the secondary market compared to September decreased by 69.6 %, or 5.6 bn tenge, and amounted to 2.4 bn tenge. The average daily volume of trading in the secondary market amounted to 116.6 mln tenge, the average daily number of transactions was one, the average volume of one transaction was 188.3 mln tenge.

In terms of the main categories of investors in the secondary MFO market, the share of broker-dealer organizations amounted to 49.7 %, that of other legal entities – 0.6 %, that of individuals – 49.7 %. Non-resident participation is estimated at 0.3 %.

UNITS OF INVESTMENT FUNDS

As of November 1, 2023, the "Investment Funds' Securities" sector included 18 instruments of unit investment trusts managed by five management companies and six ETFs.

In the reporting month, the trading volume amounted to 2.3 bn tenge and increased relative to September 2023 by 38.5 %, or 0.6 bn tenge. In terms of the main categories of investors, individuals accounted for 61.3 %, other legal entities – for 34.0 %, and broker-dealer organizations – for 4.7 %. The share of non-residents was 0.3 %.

DERIVATIVE SECURITIES

As of November 1, 2023, KASE official list included global depository receipts (GDRs) of five issues, the underlying assets of which are common shares of National Atomic Company Kazatomprom JSC, Halyk Bank of Kazakhstan JSC, Kaspi.kz JSC, Kazakhtelecom and ForteBank JSC.

Trading volume in October 2023 amounted to 124.0 mln tenge and decreased relative to September 2023 by 72.1 %, or 320.3 mln tenge. In the context of the main categories of investors, individuals accounted for 56.4 %, broker-dealer organizations accounted for 18.0 %, and other legal entities accounted for 25.6 %. The share of non-residents was less than 0.1 %.

ACCOUNTS OF INDIVIDUALS ON THE SECURITIES MARKET

As of November 1, 2023, there were 685.3 th. personal accounts of individuals in the Central Depository. At the end of October, individuals registered 5,906 new personal accounts.

FOREIGN CURRENCY MARKET

In October of this year, 33 KASE members took part in trading on KASE's foreign currency market.

The volume of trading on the foreign currency market decreased by 40.4 % compared to September – to 2.0 trln tenge. The average daily trading volume was 95.8 bn tenge, the average daily number of transactions was 769, the average volume of one transaction was 124.5 mln tenge.

The table below shows the main characteristics of currency pairs traded on KASE (in parentheses the change in the indicator compared to the previous month is indicated, the change in the rate reflects the nominal change in the weighted average exchange rate of foreign currency to the tenge).

Pair	Volume, mln currency units	Share in trading volume, %	Number of transactions	Min. and max. exchange rates, quantity of quoted currency per unit of base currency	Exchange rate as of the end of October (change %)
USD/KZT	3,435.4 (-8.3 %)	81.3 % (+29.2 %)	10,699 (-82)	468.00-480.50	469.64 (-1.1 %)
RUB/KZT	30,821.4 (-14.3 %)	7.5 % (+ 2.3 %)	4,424 (+866)	4.7200-5.1299	5.1030 (+4.3 %)
CNY/KZT	309.7 (-49.8 %)	1.0 % (- 0.2 %)	139 (-83)	62.2500-65.4700	64.1621 (-2.4 %)
EUR/KZT	60.6 (-43.0 %)	1.5 % (-0.1 %)	302 (-345)	494.28-508.25	499.22 (-0.9 %)
EUR/USD	154.6 (-92.4 %)	3.9 % (-26.0 %)	535 (-284)	1.0454-1.0937	1.0638 (+0.4 %)
USD/ CNY	201.0 (-72.2 %)	4.8 % (-5.3 %)	54 (-164)	7.2870-7.3380	7.3291 (+0.1 %)

MONEY MARKET

The total volume of trading on the money market in October amounted to 40.2 trln tenge, decreasing compared to September by 4.7 %, or 2.0 trln tenge.

On October 6, the Monetary Policy Committee of the National Bank of the Republic of Kazakhstan decided to lower the key rate to 16.0 % per annum with an interest rate corridor of +/- 1.0 percentage points. Accordingly, the rate on permanent access operations to provide liquidity was 17.0 %, and on permanent access operations to withdraw liquidity – 15.0 %.

The composite money market indicator MM_Index, which is the average value of the yield on USD/KZT currency swap transactions and automatic repo transactions with GS opened for one business day, weighted through the volume of transactions, remained at 16.39 %.

REPO TRANSACTIONS MARKET

The total volume of repo transactions in October amounted to 32.6 trln tenge, which is less than the volume in September by 2.4 trln tenge, or 6.7 %. In average daily terms, the volume of transactions amounted to 1.6 trln tenge, the average daily number of daily transactions concluded was 890, the average transaction volume was 1.7 bn tenge.

The volume of auto repo transactions with GS amounted to 25,111.1 bn tenge, or 77.1 %, auto repo with CS – 7,451.6 bn tenge, or 22.9 %, nego repo with GS – 0.2 bn tenge, or less than 0.1 %, nego repo with CS – 5.3 bn tenge, or less than 0.1 %.

By the end of October, the TONIA indicator (weighted average interest rate on repo opening deals for one business day, concluded on the Exchange in the sector of auto repo with securities of the GS Basket) decreased by 35 b.p. from 17.14 % to 16.79 % per annum.

The TRION indicator (weighted average interest rate on repo opening deals for a period of one business day, concluded on the Exchange during the day in the sector of auto repo with securities of the GS Basket, for which the Exchange carries out clearing activities using services of the Central Counterparty) decreased by 38 b.p. from 17.13 % to 16.75 % per annum.

The TWINA indicator (weighted average interest rate on repo opening deals for a period of seven working days, concluded on the Exchange in the sector of auto repo with securities of the GS Basket, for which the Exchange carries out clearing activities using services of the Central Counterparty) decreased by 48 b.p. from 16.92 % to 16.44 % per annum.

CURRENCY SWAP TRANSACTIONS

The total volume of currency swap transactions in October amounted to 7.7 trln tenge, which is higher than the volume in September by 371.5 bn tenge, or 5.1 %. The average daily volume of transactions amounted to 365.1 bn tenge, the average daily number of daily transactions concluded was 48, the average transaction volume was 7.6 bn tenge.

In the instrumental structure, 7,655.4 bn tenge, or 99.9 %, almost the entire swap trading volume, fell on swaps USDKZT, 10.2 bn tenge, or 0.1 %, – on RUBKZT, 438.4 mln tenge, or less than 0.1 % – on EURKZT.

Currency pair	Instrument	Volume, bn tenge	Volume, mln units of currency	Share in trading volume, %
USD/KZT	USDKZT_0_001	3,695.1	7,750.7	48.2
	USDKZT_0_002	3,901.5	8,184.0	50.9
	USDKZT_0_01W	39.7	83.2	0.5
	USDKZT_0_01M	19.1	40.2	0.2
EUR /KZT	EURKZT_0_001	< 0.1	< 0.1	<0.1
	EURKZT_1_001	0.4	0.9	<0.1
RUB/KZT	RUBKZT_0_001	5.0	1,033.0	<0.1
	RUBKZT_0_002	5.3	1,100.0	<0.1

The yield on the one-day dollar swap SWAP-1D (USD) as of the end of October reached 13.26 % per annum, having increased by 15 b.p. over the month. The yield on the two-day currency swap SWAP-2D (USD) increased by 114 b.p. in October up to 13.79 % per annum.

DERIVATIVES MARKET

Currently, in this sector of the exchange market, non-deliverable futures on the US dollar to tenge exchange rate, the Russian ruble to tenge exchange rate, KASE Index, common shares of Halyk Savings Bank of Kazakhstan JSC and NAC Kazatomprom JSC are available for trading.

For futures on KASE Index, the duties of a market maker on KASE are performed by NGDEM Finance JSC; for futures on common shares of Halyk Savings Bank of Kazakhstan JSC – by Halyk Finance JSC.

In October, no transactions were carried out on the derivatives market. As of November 1, there were no open positions of trading participants in the derivatives market.

For reference

Kazakhstan Stock Exchange (KASE) is a leading stock exchange in the Central Asian region. KASE occupies the second place among the CIS exchanges in terms of securities trading volume, and the fourth place in terms of the equity market capitalization among the FEAS exchanges.

It is a universal trading platform for corporate and government securities, bonds of international financial organizations, foreign currencies, transactions of the money market – repo and swap, as well as derivatives. KASE is a member of the World Federation of Exchanges (WFE), the Federation of Euro-Asian Stock Exchanges (FEAS) and other international and local professional associations, as well as a participant of the UN's "Sustainable Stock Exchanges" initiative.

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