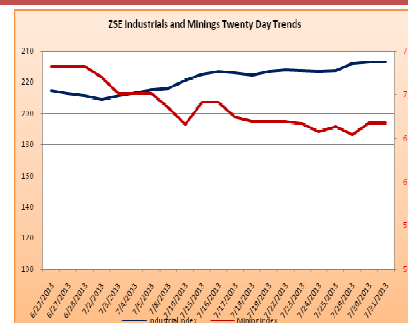
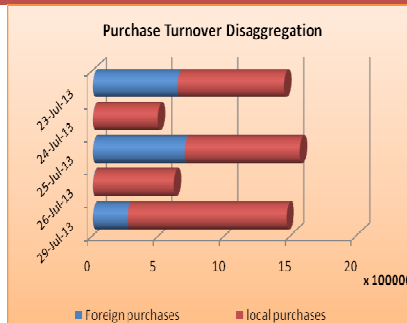
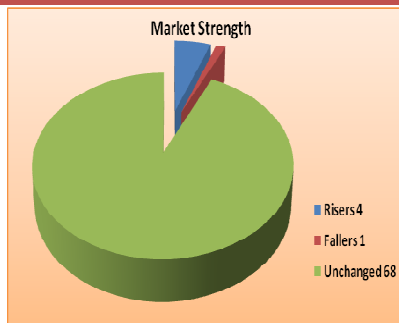




Daily ZSE market Report

01-July-2013



	30-Jul-13	01-Jul-13	% Δ
ZSE Industrials	232.87	233.18	0.13
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	66.77	66.77	0.00
Volume Traded (m)	4.29	2.40	44.04
Value Traded (US\$m)	1.13	1.42	25.48
Market Cap (US\$m)	6,340.94	6,395.97	0.87
Foreign Purchases (US\$m)	0.262	0.320	22.43
Foreign Sales (US\$m)	0.478	0.366	23.52
Number of Trades	85	34	60.00

Industrials marginally firm in month opening trades...

Industrials opened the month on the up putting on +0.13% to 233.18pts while minings were flat at 66.77pts with not trades taking place in the sector. 22 industrial stocks traded with 4 gaining, 1 losing and 17 unchanged as the nation eagerly awaits results for the 2013 harmonized elections.

Top capitalized counter Delta was the top contributor to today's turnover amassing \$0.93m with trades taking place at 150c and closed net sellers. Trailing was telecoms giant Econet shoring \$0.2m with trades at previous price of 68c and closed net buyers at 65c. Also contributing was a block trade of 0.67m Astra at 6c and worth \$0.04m. Renewed interest has been prevailing in Astra since the recent acquisition of 63.25% shareholding by Hemistar Investments an indigenous vehicle owned by Astra Management and staff and 49% by Kansai Plascon Africa Ltd.

Strong demand saw cigarette manufacturer BAT up +0.34% to new high of 1455c and bringing its YTD gain to 304.17%. Also in the positive was agri-industrial Natfoods which advanced +2.1% to 245c while global financial giant Old Mutual scratched +0.4% to end at 240c. Clothing retail stocks Edgars and Truworths were firm with the former advancing +6% to 14c while the latter was buyers only at 3.6c. The sole faller for the day was investment holding group TA which came off -2.3% to 7.62c on imminent selling pressure. Elsewhere Colcom issued a profit warning statement that profits for the year to June 2013 will be substantially lower than those recorded in prior year attributed to asset impairments and cost provisions.

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	EDGARS	14.00	6.06	75.00
2	BAT	1455.00	2.11	304.17
3	NATFOODS	245.00	2.08	85.61
4	OLDMUTUAL	240.00	0.41	57.89
5	EDGARS	14.00	6.06	75.00

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	TA	7.62	2.31	408.00

UPCOMING EVENTS

Company	Event	Venue	Date & Time
CFI	EGM	Royal Harare Golf Club	26 July 1100 HRS
Econet	AGM	Econet Park	17 Sept 1000 HRS

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