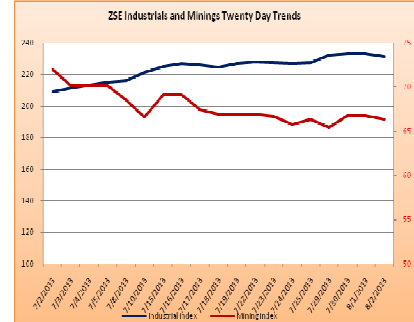
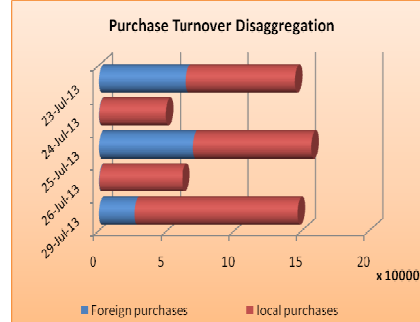
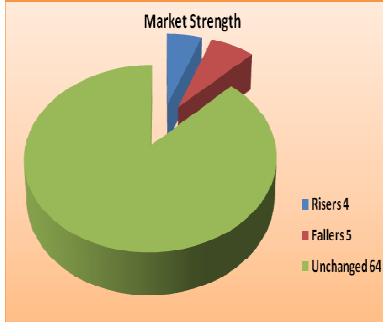




Daily ZSE market Report

02-August -2013



	01-Aug-13	02-Aug-13	% Δ
ZSE Industrials	233.18	231.21	0.84
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	66.77	66.33	0.66
Volume Traded (m)	2.40	7.17	199.19
Value Traded (US\$m)	1.42	0.90	36.58
Market Cap (US\$m)	6,395.97	6,407.54	0.18
Foreign Purchases (US\$m)	0.320	0.595	85.83
Foreign Sales (US\$m)	0.366	0.452	23.57
Number of Trades	34	51	50.00

ZSE falter as election results filter...

Investor commitment waned in week ending trades as the nation continued to receive election results. Activity was confined to 19c counters, a decline from yesterday's 22. Of these 4 gained, 5 lost and 10 were unchanged. The uneasiness saw industrials shedding -0.84% to 231.21pts. Minings also retreated -0.66% to 66.33pts weighed by the -2% fall in nickel miners BNC to 2.45c. Industrial declines were in holding company AICO down -6.8% to 7.51c, Barclays -15.5% slump to 5.5c and property stocks Dawn and Pearl -10% and -4.2% falls to 0.9c and 2.97c respectively.

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	ARTZDR	0.60	50.00	100.00
2	BAT	1475.00	1.37	309.72
3	TA	7.70	1.05	23.00
4	OLDMUTUAL	242.00	0.83	59.21

Losses of the day were countered by demand that continued to show in selected stocks with resultant rises in BAT up +1.4% to a new high of 1475c, defensive stock Old Mutual +0.8% leap to 242c and investment group TA +1% recovery to 7.7c. The three risers ended buyers only. The day's top riser was stationery trading and battery manufacturer ART that jumped +50% to close at 0.6c. Trades of the day were somehow evenly spread with leading turnover contributions of \$0.18m in BAT, \$0.22m in DZL and \$0.15m in Pearl.

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	BARCLAYS	5.50	15.38	111.54
2	DAWN	0.90	10.00	28.57
3	AICO	7.00	6.79	22.22
4	PEARL	2.97	4.19	6.07
5	BINDURA	2.45	2.00	79.58

Turnover of the day came down -37% to \$0.9m despite improved foreign participation with purchases surging +86% to \$0.6m and sales up +24% to \$0.5m. Friday volumes rose 200% to 7.2m boosted by the 5.1m Pearl block trade.

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
NTS	AGM	NTS Head office Seke Road	22 Aug 1200 HRS

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