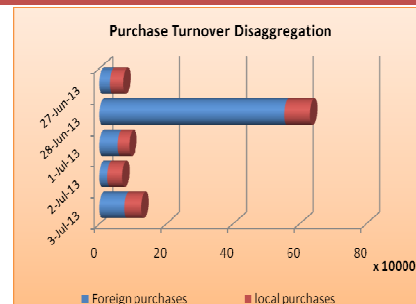
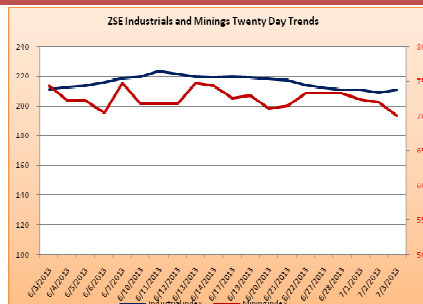
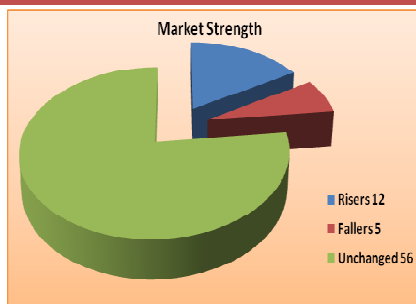




Daily ZSE market Report

03-July-2013



	02-Jul-13	03-Jul-13	% Δ
ZSE Industrials	209.16	211.20	0.98
ZFN top ten	155.76	155.76	0.00
ZFN Banking index	78.63	78.63	0.00
ZSE Mining	71.95	70.12	2.54
Volume Traded (m)	3.35	9.06	170.22
Value Traded (US\$m)	0.89	1.25	40.73
Market Cap (US\$m)	5,925.56	5,855.08	1.19
Foreign Purchases (US\$m)	0.230	0.734	219.31
Foreign Sales (US\$m)	0.257	0.466	81.64
Number of Trades	65	85	30.77

Delta recovery halts ZSE freefall as industrials trades in the positive...

The ZSE posted a comeback recording positive gains in the industrials to close at 211.2pts a 0.98% gain from yesterday. The Mining Index on the other hand suffered a 2.54% swipec to 70.12pts on losses in Hwange which shed 8.57% to 16c. Gains were buoyed by recoveries in heavy cap Delta OK and African sun among others. Increased foreign demand in Delta stimulated a +1.85% surge for the beverages manufacturer to 140c. African sun recovered 10% to 2.2c after an earlier knock prior to their results presentation last week. OK on the other hand recovered 5.5% to 23.22c after announcing a partnership with a South African company Kawena involving cross border shopping deal ahead of their AGM later in the month.

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	HUNYANI	4.00	60.00	8.11
2	G/BELTINGS	0.07	40.00	600.00
3	AFRICAN SUN	2.20	10.00	144.44
4	CFI	7.00	7.69	42.86
5	OK	23.22	5.55	54.80

Other gainers for the day were Hunyani which put up 60% to 4c after reporting improved profitability from continuing operations in their half year to April 2013. CFI who are planning to sell 49% of their shareholding in Victoria foods to a south African company surged 7.69% to 7c. Elsewhere General Beltings firmed 40% and closed at 0.07c to sum up the top risers for the day.

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	TURNAL	5.00	9.09	9.09
2	HWANGE	16.00	8.57	5.88
3	STAR AFRICA	1.30	7.14	13.33
4	OLDMUTUAL	210.00	1.87	38.16
5	ZIMPLOW	5.00	0.20	18.03

Other top losers for the day were Turnall which dropped 9% to 5c. Sugar refiner Star Africa eased 7% to 1.3c after announcing a withdrawal of their cautionary statements and that they are putting on market their logistics arm and also offloading their Tongatt hulllets Botswana shareholding as part of measures to extinguish their debt. Zimplot and Old Mutual were the other notable losers softening 0.2% and 1.87% to 5c and 210c respectively .other indicators took a northward retreat with foreign demand surging by 219% to \$0.7m while turnover increased 49% to \$1.25m

UPCOMING EVENTS

Company	Event	Venue	Date & Time
OK ZIMBABWE	AGM	OK Mart Functions, 30 Chiremba Road	19 July 1000 HRS
STAR AFRICA	EGM	45 Douglas Road, Workington	19 July 1000 HRS
INTERFRESH	AGM	Miti Conference Room, Cresta Lodge, Msasa	22 July 1000 HRS
DELTA	AGM	Head Office, Northridge Close, Borrowdale	24 July 1200 HRS
CFI	EGM	Royal Harare Golf Club	26 July 1100 HRS

CAUTIONARY STATEMENTS/CIRCULARS ISSUED

Company	Date Issued / reissued	Description
ASTRA	02may 2013	Negotiations ongoing about the possible acquisition of RBZ's stake in the group
AICO	15 February 2013	Renewal of cautionary statement about a series of transactions that may impact on group structure (possible unbundling of the group)
CFI	8 January 2013	The cautionary was renewed with the directors advising Shareholders to exercise caution in trading the shares. The firm is involved in restructuring exercise-seeking investors for the poultry division.
STAR AFRICA	17 January 2013	Cautionary statement was reissued that the management is engaged in discussions that may have material impact on value of shares
ARISTON	23 may 2013	The cautionary was renewed with the directors advising Shareholders to exercise caution in trading the shares.
ZBFH	10 April 2013	Cautionary notice to shareholders on negotiations
PELHAMS	8 April 2013	Profit warning for the financial year to march 2013

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