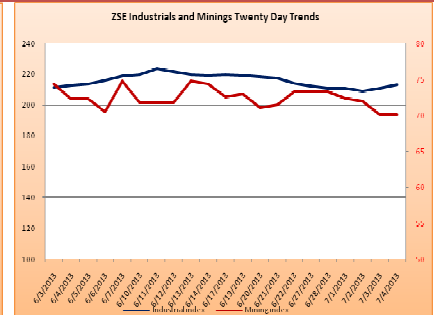
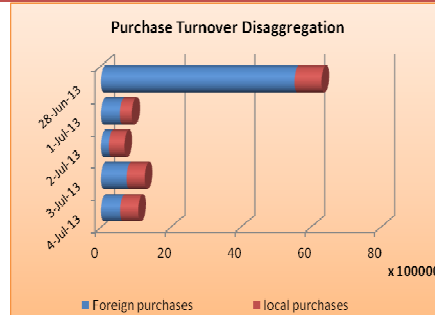
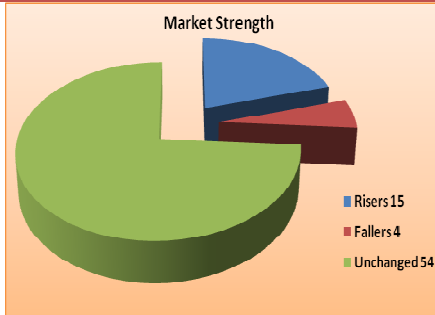




Daily ZSE market Report

04-July-2013



	03-Jul-13	04-Jul-13	% Δ
ZSE Industrials	211.20	213.43	1.06
ZFN top ten	146.68	147.78	0.75
ZFN Banking index	78.63	80.72	2.66
ZSE Mining	70.12	70.12	0.00
Volume Traded (m)	9.06	5.62	37.96
Value Traded (US\$m)	1.25	1.06	15.19
Market Cap (US\$m)	5,855.08	5,902.65	0.81
Foreign Purchases (US\$m)	0.734	0.545	25.73
Foreign Sales (US\$m)	0.466	0.009	98.05
Number of Trades	85	106	24.71

Industrials firm as financials came tops...

Industrials added another 1.07% to 213.43 pts in the wake of 15 gainers dominated by financials as bullish sentiment returned to the ZSE. Firm demand saw Barclays jumping +10.9% to 5c, FBC +20% to 12c, Fidelity +3.8% to 13.49c and Nicoz +2.7% to 1.55c. A few days into their new reporting year Colcom, Innscor and Padenga firmed with rises of +12.9%, +1.1% and +0.14% to 35c, 93.2c and 6.91c respectively. The meat processor Colcom topping the gainers for the day.

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	FBCH	12.00	20.00	60.00
2	COLCOM	35.00	12.87	40.00
3	BAT	1175.00	11.90	226.39
4	TSL	30.00	11.11	160.87
5	BARCLAYS	5.00	10.86	92.31

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	ZHL	1.10	21.43	8.33
2	ZIMPAPERS	1.01	8.18	26.25
3	NATFOODS	240.00	2.04	81.82
4	OK	23.20	0.09	54.67

Tobacco industry allied companies were also among the top performers reaching new highs as cigarette manufacturers BAT rallied +11.9% to 1,175c while TSL advanced 11.1% to 30c with firm demand remaining in both. The surges are ahead of the end of the tobacco selling season this Friday. Other notable gains of the day were African Sun +2.3% to 2.25c, AICO +4.6% to 6.9c, Econet +0.52% to 64.33c, Meikles +0.32% to 31.6c and PPC +4.2% to 250c.

Amongst the four loses for the day was National Foods -2.04% to 240c on profit taking with sellers remaining at closing price. OK shed a marginal -0.1% to 23.2c, ZHL was a massive -21.4% lower to 1.1c and Zimpapers -8.2% to 1.01c as prices came to the buyers' levels. Minings were unchanged at 70.12pts as the only in the sector took place in Bindura at 2.6c which closed sellers. Activity was rather subdued with turnover falling 15.2% to \$1.06m and value declining 38% to \$5.6m. Foreign inflows took a 25% knock closing at \$0.545m.

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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