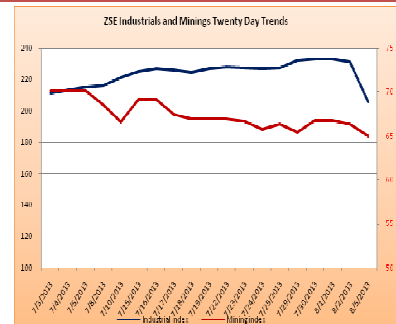
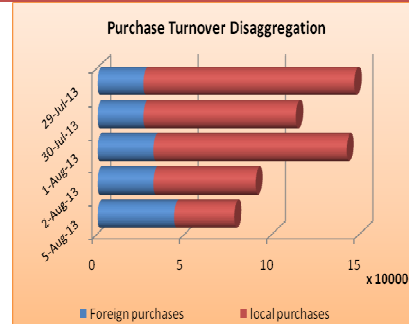
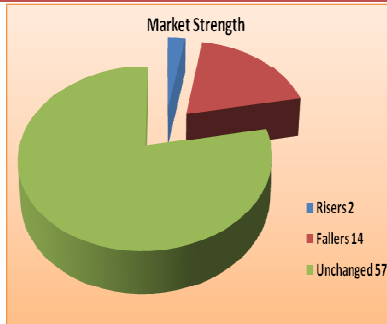




Daily ZSE market Report

05-August -2013



	02-Aug-13	05-Aug-13	% Δ
ZSE Industrials	231.21	205.57	11.09
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	66.33	65.00	2.01
Volume Traded (m)	7.17	5.34	25.54
Value Traded (US\$m)	0.90	0.78	13.48
Market Cap (US\$m)	6,395.97	6,385.07	0.17
Foreign Purchases (US\$m)	0.320	0.438	36.89
Foreign Sales (US\$m)	0.366	0.441	20.50
Number of Trades	34	39	14.71

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	ZHL	1.40	16.67	16.67
2	OLDMUTUAL	242.03	0.01	59.23
3				
4				

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	EDGARS	10.00	28.57	25.00
2	AFRICAN SUN	1.50	25.00	66.67
3	DELTA	120.00	20.00	20.00
4	STAR AFRICA	1.00	16.67	33.33
5	ZPI	1.00	16.67	16.67

Stock market tumbles post full election results...

The ZSE went into the red on the first day of trading following the announcement of full election results over the weekend. Industrials fell -11.1% to 205.57pts while minings retreated -2% to 65.00 pts. The losses resulted in the minimization of both indices' YTD returns with industrials ending at +34.89% and minings at -0.18%. Minings fell on the back of reduced offer in BNC at 2.3c.

The loss in industrials was mostly premised on declines in top capitalized stocks. Delta declined -20% to 120c and closed sellers only at 135c. Telecomms giant Econet slid -14.7% to trade at 58c on \$458 worth of trades. Sugar cane processors Hippo fell -14.8% to 100c and ended buyers only at 100c. Diversified group Innscor was down -14.3% to 90c and closed on a tight spread of 85c - 90c. Retailers OK fell -13.3% to 26c. The leading loser of the day was clothing retailer Edgars which eased -28.6% to 10c on deals worth \$21 and following was hotel group African Sun which gave up -25% to 1.5c.

Trading in the positive was insurance holding company ZHL which went up +16.7% to 1.4c and Old Mutual which added a marginal 0.01% to 242.03c. Elsewhere BAT held firm with buyers at 1450c and Seedco steady at 82c. Major contributors to today's turnover were Delta which amassed 74% (\$0.58m) and Pearl which took up 14% (\$0.11m) of the values traded. A total of 39 trades (up 14%) were recorded yielding total turnover \$0.78m which was -13.5% softer. Foreign inflows saw a +36.9% improvement to \$0.44m, while outflows increased +20.5% to \$0.44m.

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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