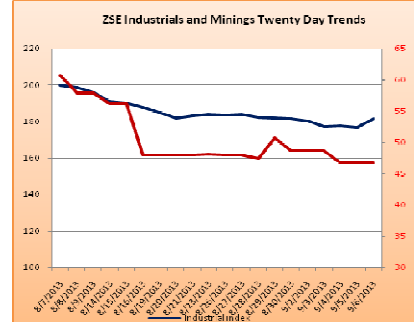
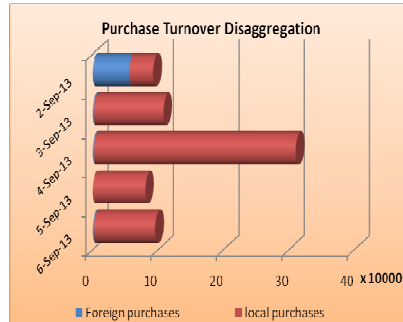
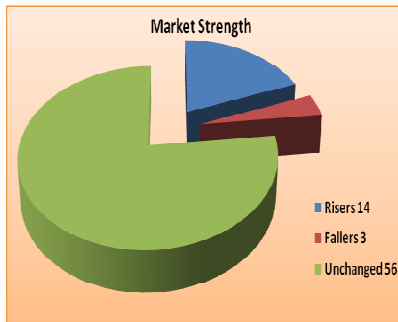




Daily ZSE market Report

06-Sept -2013



	05-Aug-13	06-Sept-13	% Δ
ZSE Industrials	176.99	181.76	2.70
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	46.78	46.78	0.00
Volume Traded (m)	6.58	3.35	49.03
Value Traded (US\$m)	3.11	0.96	69.25
Market Cap (US\$m)	4,885.16	4,866.86	0.37
Foreign Purchases (US\$m)	0.000	0.021	100
Foreign Sales (US\$m)	0.132	0.700	430.26
Number of Trades	54	70	29.63

ZSE in weekend recovery as selloff subsides ...

Value of trades declined by 69.25% to \$0.96m as selloffs moderated in week ending trades which may imply a possible bottoming up as sellers diminish. 70 trades were spread across the bourse with major ones being in Old Mutual which contributed 53% to turnover on a block trade at 230c. Retailers OK put up a fair share of 18.6% value to the total to earn a 2nd spot. Volumes likewise were depressed at 3.35m a downfall of 49% from yesterday, OK's contribution at 25% was the highest followed by Barclays at 15%.

Subdued selling at current levels necessitated a industrials comeback putting up a respectable 2.7% to 181.76 wiping out the previous 4 days losses. Delta was strongly bid higher at 113.05c and traded at 113.1c which is 8% up on previous close thus providing a stimuli to the industrials. Other heavy cap gains were recorded in Inncor and Econet which closed higher at 80.03c and 49.5c with gains of 0.04% and 3% respectively.

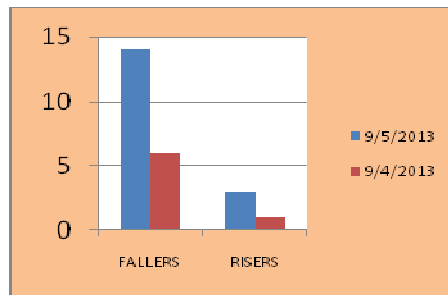
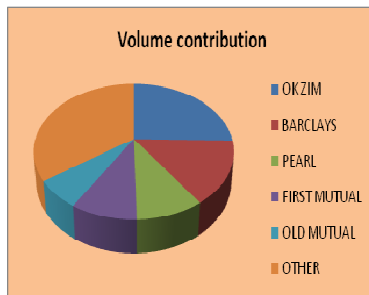
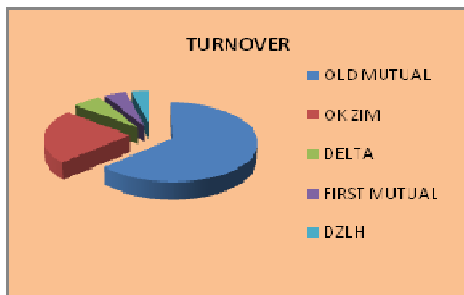
Overall there were 16 risers and 3 fallers. Hunyani was the top mover adding 20% to 3c followed by Mashhold which firmed 13% to 3.42c. Turnall and Truworths were 12% and 11% higher at 4.49c and 3c respectively at close of call. On the fallers were Zimplow which eased 12.5% to 3.5c. BAT and Padenga were also on the downside softening 8% and 1.7% to 900c and 5.8c respectively.

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	HUNYANI	3.00	20.00	18.92
2	MASHHOLD	3.42	13.25	32.05
3	TURNAL	4.49	12.25	18.36
4	TRUWORTHS	3.00	10.70	20.00
5	DELTA	113.10	7.69	13.10

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	ZIMPLOW	3.50	12.50	42.62
2	BAT	900.00	8.16	150.00
3	PADENGA	5.80	1.69	28.89
4				
5				



Dividend Monitor

<u>Company</u>	<u>Dividend Type</u>	<u>Div Amount</u>	<u>Record date</u>	<u>Payment Date</u>
Old Mutual	interim	2.1GBp	27.09.13	31.10.13
ABC	interim	14 thebe	30.08.13	13.09.13
FBC	interim	0.149USc	06.09.13	24.09.13
CBZ	interim	0.1673Usc	06.09.13	17.09.13
INNSCOR	Final	1c	20.09.13	04.10.13
NATFOODS	Final	3c	20.09.13	04.10.13

UPCOMING EVENTS

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Date & Time</u>
NTS	AGM	NTS Head office Seke Road	TBA
Econet	AGM	Econet Park	17 Sept 1000 HRS
Dawn	AGM	Ophir Room , Crowne Plaza	25 Sept 1000 HRS
Pearl	ANALYSTS BRIEF	Royal Harare Golf Club	09Sept 1200 HRS
FML	ANALYSTS BRIEF	Royal Harare Golf Club	09Sept 1400 HRS

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