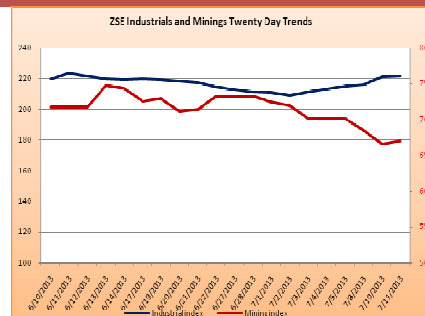
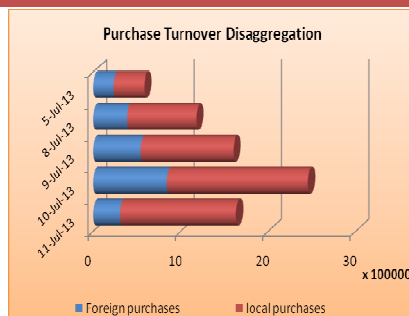
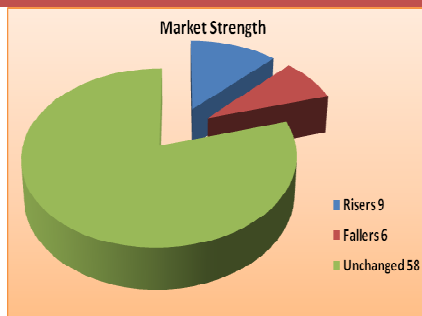




# Daily ZSE market Report

11-July-2013



	10-Jul-13	11-Jul-13	% Δ
ZSE Industrials	221.27	221.78	0.23
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	66.57	66.94	0.56
Volume Traded (m)	6.56	61.80	842.00
Value Traded (US\$m)	2.45	1.63	33.53
Market Cap (US\$m)	6,097.44	6,097.44	0.00
Foreign Purchases (US\$m)	0.839	0.302	64.06
Foreign Sales (US\$m)	0.882	0.129	85.40
Number of Trades	78	76	2.56

### Medtech and NTS spurs volumes in mixed trades...

Block trades in Medtech (46m shares) and NTS (10m) propelled the day's volumes which surged 842% to 61.8m. Despite the volume surge the market was in a -33.5% drop in value of trades to \$1.6m on the back of lower foreign participation in both buys and sells that declined -64% to \$0.3m and -85% to \$0.13m respectively. Industrials added a marginal +0.23% to 221.78pts in a mixed session that witnessed 9 risers and 6 fallers. The resources index firmed +0.56% to 66.94pts driven by a 2% rise in coal miners Hwange to 15c.

#### Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	TRUWORTHS	4.00	14.29	60.00
2	BARCLAYS	5.60	11.78	115.38
3	NTS	2.20	10.00	26.67
4	HWANGE	15.00	2.04	11.76
5	ZIMFLOW	5.10	2.00	16.39

#### Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	FIDELITY	12.00	11.11	0.00
2	TA	9.00	10.00	10.00
3	AFRICAN SUN	2.10	6.67	133.33
4	HUNYANI	3.50	5.41	5.41
5	NATFOODS	230.00	4.17	74.24

Confidence in banks remained with demand showing in Barclays up +11.8% to 5.6c while CBZ and NMBZ closed with buyers at trading prices of 14.12c and 10c respectively. Driving industrials today was telecoms giant Econet which shored up the bulk of the funds traded (42% or \$0.67m) rising +1.3% to 68c ending net buyers. Similarly firm bids were in OK which added a marginal +0.38% to 26.21c as well as Old Mutual that was +0.47% up at 233.1c. Elsewhere clothing retailers Truworths recovered for the second consecutive day rallying +14.3% to 4c while and diversified group ZHL was up +1.6% at 1.3c. Holding company Zimplow added +2% to 5.1c following news that it offloaded Puze and Payne to management in a move to streamline operations and focus on its core business.

Leading the loses for the day were insurers Fidelity down -11.1% to 12c, investments group TA -10% to 9c and Hunyani -5.4% to 3.5c, all in paltry trades. African Sun fell -6.7% to 2.1c as the market seeks its right trading price. Heavyweights National Foods slumped -4.2% to 230c on profit taking to complete the shakers.

**UPCOMING EVENTS**

Company	Event	Venue	Date & Time
ECONET ZW	AGM	ECONET Park, Msasa	30 July 1000 HRS
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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