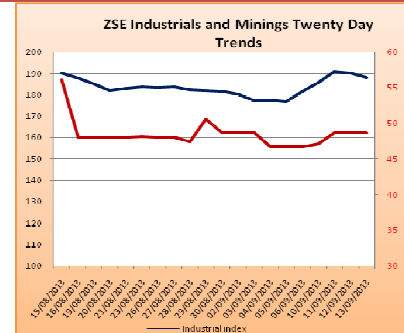
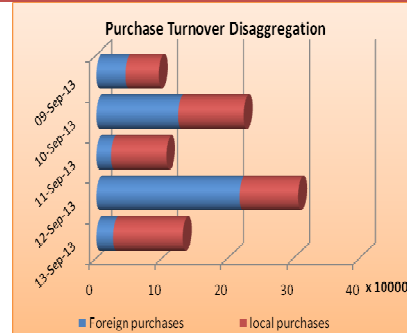
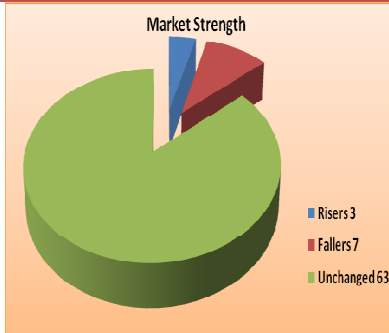




# Daily ZSE market Report

13-Sept -2013



	12-Aug-13	13-Sept-13	% Δ
ZSE Industrials	190.24	188.35	0.99
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	48.73	48.73	0.00
Volume Traded (m)	9.01	3.16	64.94
Value Traded (US\$m)	3.06	1.31	57.17
Market Cap (US\$m)	525.63	522.55	0.59
Foreign Purchases (US\$m)	2.173	0.257	88.18
Foreign Sales (US\$m)	2.815	0.669	76.25
Number of Trades	54	67	24.07

## Slow down persist to week ending...

Market indicators were predominately negative in thin week ending trades that saw only 24 active industrial stocks. Volumes plummeted -64.9% to 3.16m, dominated by 1.2m shares that changed hands in CBZ at prior price of 13c. Similarly turnover declined -57.2% to \$1.3m with leading contributions of \$0.59m and \$0.3m in Delta and Innscor respectively. Foreign interest was also subdued with buys down -88.2% to \$0.26mn while sales came off -76.2% to \$0.67m. Industrials retreated -0.99% to 188.35pts largely on heavyweight sell offs in which Delta weakened -3.9% to 120.09c and Econet eased -0.9% to 53.5c; Minings were flat at 48.73pts

### Top Risers

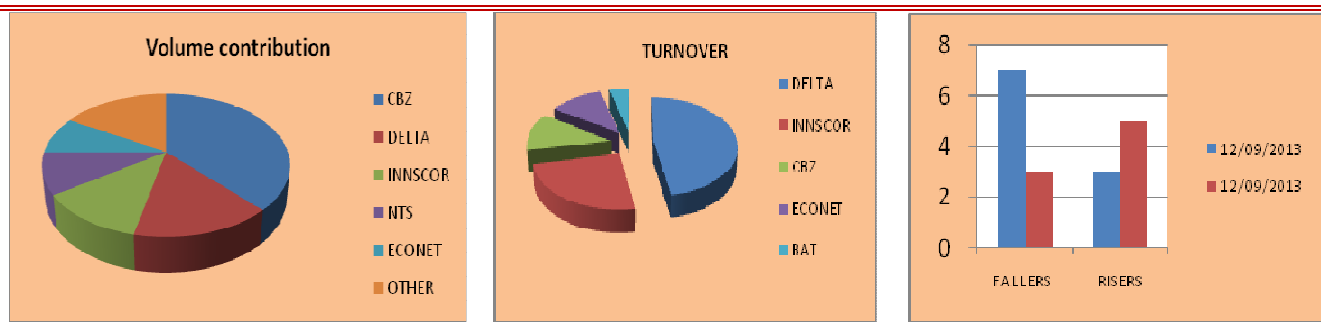
	Stock Name	Price	% Δ	YTD Δ %
1	RTG	1.70	13.33	29.17
2	BAT	1000.00	8.70	177.78
3	NTS	3.00	3.45	0.00
4				
5				

### Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	WILLDALE	0.25	16.67	400.00
2	MEDTECH	0.05	16.67	66.67
3	DAWN	0.90	10.00	28.57
4	MASIMBA	9.00	5.26	200.00
5	DELTA	120.09	3.85	20.09

Penny stocks led today's losers with Medtech and Willdale shedding identical -16.8% to 0.05c and 0.25c respectively while Dawn lost -10% to its support price of 0.9c on a mere \$2.61 trade. Masimba due to release its first finals post restructuring fell -5.3% to end at 9c with sellers only.

Selective demand resulted in three advances led by recovery play RTG that firmed +13.3% to 1.7c reducing its YTD loss to -29.2%. Cigarette manufacturers BAT rose +8.7% to 1,000c to follow. This follows its interims showing \$11.6m net cash generated from operations up +188% on its comparable period. In the same reported period the company realized a share based expense of \$10.2mn being payment towards the Indigenous Employee Share Ownership Trust significantly depressing operating profit -66% to \$2.4mn. Illiquid NTS strengthened +3.5% to 3c ahead of its AGM slated for next week Friday.



**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 &amp; Time</u>
NTS	AGM	NTS Head office Seke Road	20 Sept 1430 HRS
Econet	AGM	Econet Park	17 Sept 1000 HRS
Dawn	AGM	Ophir Room , Crowne Plaza	25 Sept 1000 HRS
BINDURA	AGM	Charpman Golf Club	19 Sept 0930 HRS
HIPPO	AGM	Meikles	16 Sept 1200 HRS

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