

	13-Nov-13	14-Nov-13	% Δ
ZSE Industrials	215.36	215.08	0.13
ZSE Mining	46.54	46.09	0.97
Volume Traded (mn)	6.89	2.71	60.70
Value Traded (US\$ mn)	1.24	0.86	30.82
Market Cap (US\$ mn)	5,938.79	5,924.56	0.24
Foreign Purchases (US\$ mn)	1.001	0.798	20.23
Foreign Sales (US\$ mn)	0.647	0.211	67.35
Number of Trades	62	75	20.97

*** Market Cap is Inclusive of Econet Class A Shares

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	MEDTECH	0.07	40.00	133.33
	ZIMPAPERS	0.90	12.50	12.50
3	PADENGA	9.00	2.27	100.00
4	OLDMUTUAL	275.00	1.85	80.92
5	DELTA	145.50	0.34	45.50

Top Fallers

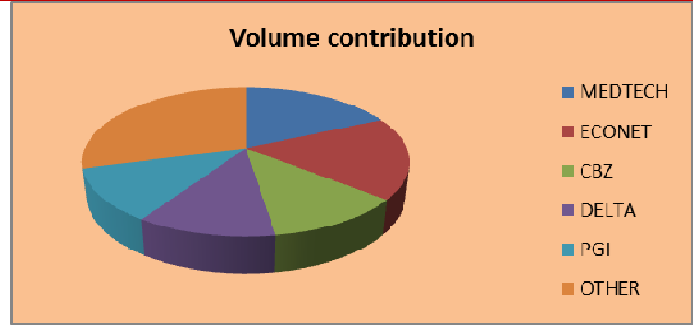
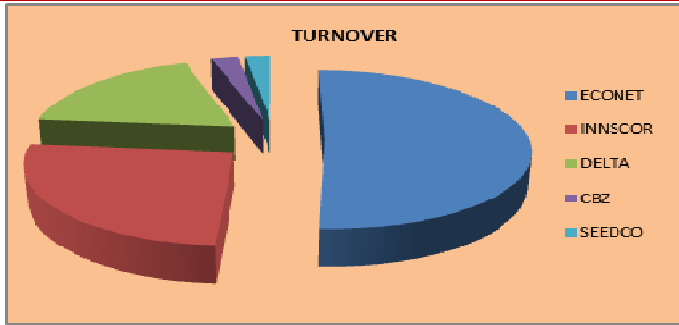
	Stock Name	Price	% Δ	YTD Δ %
1	ZIMPLOW	3.52	12.00	42.30
2	SEEDCO	90.10	8.99	17.01
3	TURNAL	5.30	3.64	3.64
4	BINDURA	1.85	2.63	84.58
5	PPC	250.00	0.40	25.00

Impressive Delta interims fail to sustain industrials surge...

Most indicators softened in Thursdays trades as the impressive set of Delta's half year results presented yesterday failed to inspire the rest of the market. Revenues for the beverages maker grew 5% while operating income was 10% up on prior year giving an after tax profit of \$47.7m which is 12% ahead of last year. Their latest offering super chibuku spurred the group's aggregate volumes growth. Delta plans to construct a \$8m line for its chibuku super brand to be commissioned by April next year in a bid to keep up with growing demand. In today's session Delta posted a 0.34% gain to 145.5c though this was not enough to outweigh the losses which resulted in a -0.13% loss for the Industrials to 215.08pts. The Mining Index swung back into the red releasing 0.97% to 46.09pts as Bindura foregore 2.6% to close at 1.85c reversing yesterday's gains.

Dragging the industrials were losses in Seedco which eased 8.99% to 90.10c, on paltry a volume of 5,554 shares, from a previous close of 99c. Heavy bidding post the announcement of a \$25m deal involving a French based seed company Vilmorin Cie, saw the price top 100c in the run up to the AGM where the deal was approved by shareholders. Other notable losers were Zimplot which eased 12% to 3.25c while Turnall was 3.64% softer at 5.3c, PPC dropped 0.4% to 250c. Mitigating the market losses were gains in financial service group Old mutual that added +1.85% to 275c on strong demand and agro based concern Padenga that put on +2.27% to 9c.

In similar fashion values and volumes for the day eased 30.8% and 60.7% to \$0.86m and 2.71m shares respectively. Foreigners were net buyers as purchases at \$0.8m compared favorably to sales of \$0.2m. The foreign inflows constituted 93% of the aggregate value traded however both indicators were softer compared to prior levels.



Dividend Monitor

<u>Company</u>	<u>Dividend Type</u>	<u>Div Amount</u>	<u>Record date</u>	<u>Payment Date</u>
TRUWORTHS	Final	0.078c	18.10.13	29.11.13
MASIMBA		0.12c	11.10.13	13.11.13

UPCOMING EVENTS

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Date & Time</u>
CBZ	Nil cost dealing facility (NCDF)	CLOSES	01 DEC 2013
COLCOM	AGM	1 COVENTRY ROAD, WORKINGTON	15 NOV - 9.00 AM
BORDER TIMBERS	AGM	TANGANYIKA HSE, 4 TH FLOOR	20 NOV - 9.00 AM
RADAR	AGM	TANGANYIKA HSE, 6 TH FLOOR	20 NOV - 2.00 PM
INNSCOR	AGM	ROYAL HARARE GOLF CLUB	22 NOV - 8:00 AM
MEIKLES	EGM	STEWARD ROOM, MEIKLES HOTEL	27 NOV - 9.00 AM

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