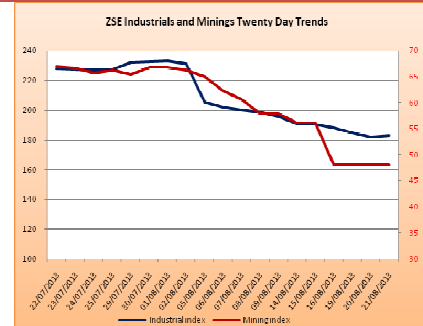
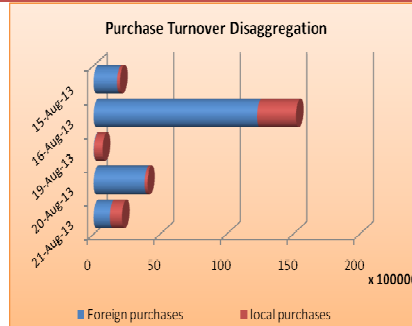
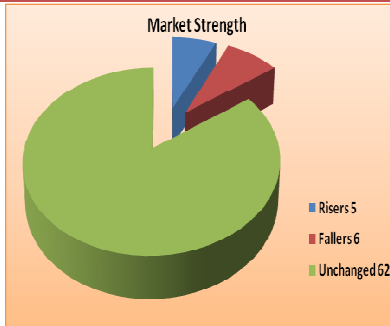




Daily ZSE market Report

21-August -2013



	20-Aug-13	21-Aug-13	% Δ
ZSE Industrials	182.05	183.14	0.60
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	48.05	48.05	0.00
Volume Traded (m)	17.54	8.91	49.24
Value Traded (US\$m)	4.04	2.14	46.95
Market Cap (US\$m)	5,157.38	5,004.07	2.97
Foreign Purchases (US\$m)	3.806	1.203	68.40
Foreign Sales (US\$m)	3.809	1.184	68.93
Number of Trades	58	80	37.93

ZSE recovers from an 8 day losing streak ahead of the inauguration....

The mainstream index recorded gains of 0.6% to 183.14pts after eight successive losses post harmonized election results announcement and this came just a day before the president elect is set to be inaugurated. Gains in heavyweights OK and HIPPO of 5% apiece to 21c and 105c respectively outweighed losses in Delta which retreated 0.88% to 113c and ECONET which equally lost 0.93% to 50c. The later has also found itself at loggerheads with the regulatory board POTRAZ over its recent 60% tariff slash with regulator ordering the telecoms giant to reverse the move.

Top Risers

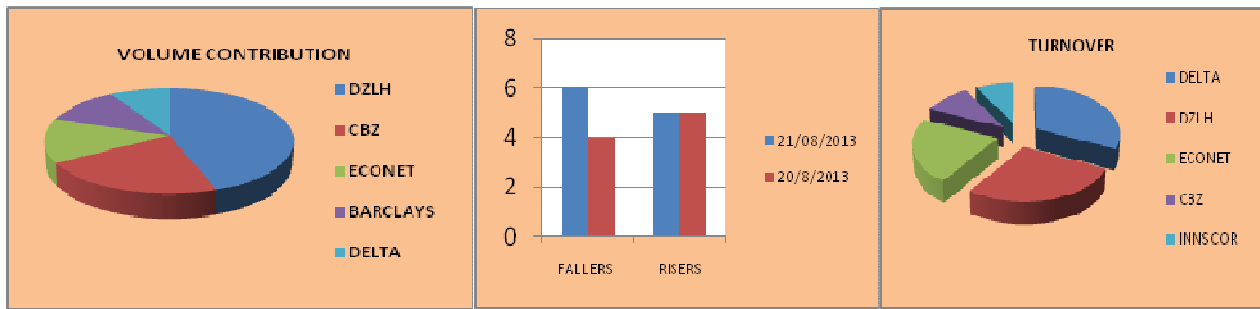
	Stock Name	Price	% Δ	YTD Δ %
1	RTG	1.21	10.00	49.58
2	HIPPO	105.00	5.00	5.41
3	OK	21.00	5.00	40.00
4	AFRICAN SUN	2.07	3.50	130.00
5	MEIKLES	30.00	3.45	100.00

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	NTS	2.90	17.14	3.33
2	ARTZDR	0.50	9.09	66.67
3	PADENGA	6.00	7.69	33.33
4	CBZ	14.00	6.67	40.00
5	ECONET	50.00	0.93	11.11

Hospitality focused groups were amongst the major gainers for the day including RTG which added 10% to 1.21c in the wake of its interim results presentation which saw them recovering from a loss in the comparable period last year to a profit of \$0.105m. Its peer African sun continued to bubble adding 3.5% to close at 2.07c ahead of the UNWTO. Meikles firmed 3.45% to 30c after reports that its mining partner Centar Mining is ready to inject \$500m capital. Elsewhere FBC traded unchanged at 9c before reporting an increase of 24% in profitability in the 6 months to June. Turnall also traded unchanged ahead of its analysts briefing this afternoon.

Other indicators softened with volumes easing 49% to 2.14m while value traded retreated by 47% to \$5m. The major value contributions were Delta (29%) and DZLH (25%) while volume wise DZLH's 25% and CBZ's 22% anchored. Foreign flows almost cancelled each whereas both eased 68% on yesterday.



COMPANY	EVENT	LDR RECORD DATE	END
INTERFRESH	RIGHTS OFFER	22.07.13	28.08.13
OLD MUTUAL	INTERIM DIVIDEND	TBA	TBA

UPCOMING EVENTS

Company	Event	Venue	Date & Time
NTS	AGM	NTS Head office Seke Road	22 Aug 1200 HRS
SEEDCO	AGM	Seedco Admin Block, Stapleford	29 Aug 1430 HRS
AICO	AGM	Northridge Park Borrowdale	30 Aug
Econet	AGM	Econet Park	17 Sept 1000 HRS

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