

| | 21-Nov-13 | 22-Nov-13 | % Δ |
|-----------------------------|-----------|-----------|----------|
| ZSE Industrials | 217.48 | 217.01 | 0.22 |
| ZSE Mining | 47.41 | 49.20 | 3.78 |
| Volume Traded (mn) | 2.84 | 51.16 | 1698.41 |
| Value Traded (US\$ mn) | 0.53 | 2.91 | 453.71 |
| Market Cap (US\$ mn) | 5,986.65 | 5,992.74 | 0.10 |
| Foreign Purchases (US\$ mn) | 0.297 | 0.818 | 175.59 |
| Foreign Sales (US\$ mn) | 0.001 | 0.268 | 19071.14 |

Further dent on ZSE as industrials ends week in sideways trades...

The ZSE continued to trade sideways in week ending trades closing today's session softer. The bourse' prime index closed 0.22% softer at 217.01pts weighed down by post results selloff in retailer OK and diversified conglomerate Innscor. OK has been losing luster among investors since presenting a moderate set of financials for the interim period to September 2014 where a flat bottomline outturn was achieved despite revenue growth of 5.4% over the same period. Innscor had, at their AGM earlier today, reported a 5% turnover growth in the first quarter while profitability went down 18%. OK lost 2.04% to 24c while Innscor was 1.16% softer at 85c at close of call. The minings sustained its purple patch putting the icing on a fair week with a 3.78% gain on prior levels to 49.20pts. However the gain was attributable to improved propensity on the buy side in Bindura that hit 2.2c with no sellers in sight to quench the demand at those levels.

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

Top Risers

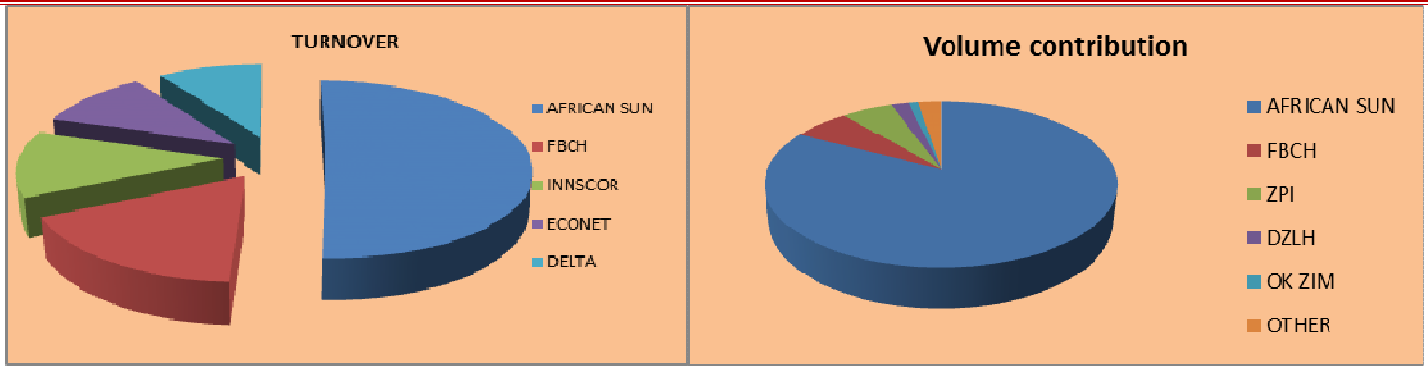
| | Stock Name | Price | % Δ | YTD Δ % |
|---|-------------|--------|------|---------|
| 1 | AFRICAN SUN | 2.70 | 3.85 | 200.00 |
| 2 | OLDMUTUAL | 280.00 | 0.72 | 84.21 |
| 3 | DELTA | 151.01 | 0.33 | 51.01 |
| 4 | SEEDCO | 91.00 | 0.02 | 18.18 |
| 5 | | | | |

Top Fallers

| | Stock Name | Price | % Δ | YTD Δ % |
|---|-------------|-------|-------|---------|
| 1 | WILLDALE | 0.15 | 21.05 | 200.00 |
| 2 | DAWN | 1.00 | 16.67 | 42.86 |
| 3 | NTS | 2.80 | 12.50 | 6.67 |
| 4 | STAR AFRICA | 1.20 | 7.69 | 20.00 |
| 5 | TA | 6.50 | 7.14 | 35.00 |

The upside, though colourfully decorated with heavy caps in the mold of Old Mutual, Delta and SeedCO which gained 0.72%, 0.33% and 0.02% respectively, failed to mitigate the losses. Delta and Old Mutual have featured regularly among the risers in the week with the former riding on an impressive HY 2014 financial performance while the latter is enjoying an arbitrage discount to the London and Johannesburg prices. African sun whose special bargain of 42,300,455 shares highlighted today's session was the top riser adding 3.85% to 2.7c in normal trades. Willdale slumped 21% to 0.15c to claim a spot at the apex of the losers on shares valued at a meager 21c.

Value and volumes traded stood at \$2.91m and 51.16m shares being 453% and 1700% ahead of yesterday. Value traded surpassed the weekly average by 19% and was the highest in the week on the back 2 special bargains in African Sun and FBCH.



Dividend Monitor

| Company | Dividend Type | Div Amount | Record date | Payment Date |
|-----------|---------------|------------|-------------|--------------|
| TRUWORTHS | Final | 0.078c | 18.10.13 | 29.11.13 |
| DELTA | Delta | 1.3c | 11.11.13 | 11.12.13 |
| OK | Interim | 0.2c | 20.12.13 | 14.01.14 |

UPCOMING EVENTS

| Company | Event | Venue | Date & Time |
|---------|----------------------------------|-----------------------------|------------------|
| CBZ | Nil cost dealing facility (NCDF) | CLOSES | 01 DEC 2013 |
| 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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