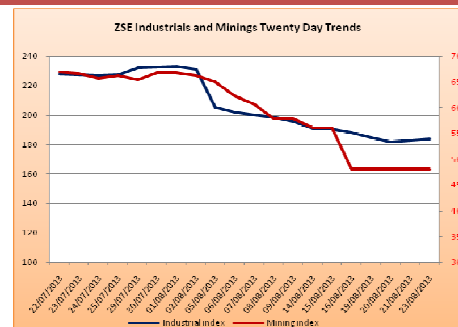
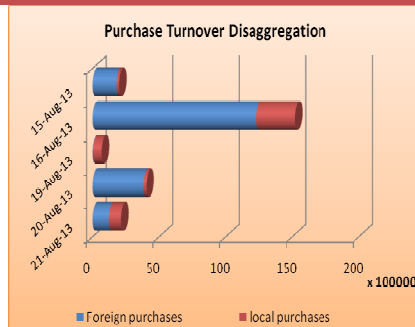
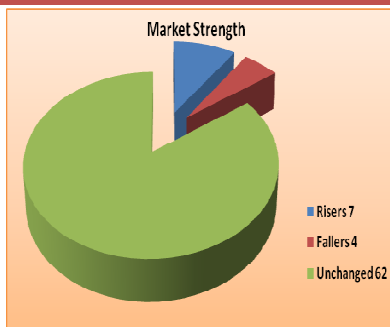




# Daily ZSE market Report

23-August -2013



|                           | 21-Aug-13 | 23-Aug-13 | % Δ   |
|---------------------------|-----------|-----------|-------|
| ZSE Industrials           | 183.14    | 183.90    | 0.41  |
| ZFN top ten               | 147.78    | 147.78    | 0.00  |
| ZFN Banking index         | 80.72     | 80.72     | 0.00  |
| ZSE Mining                | 48.05     | 48.14     | 0.19  |
| Volume Traded (m)         | 8.91      | 4.55      | 48.90 |
| Value Traded (US\$m)      | 2.14      | 2.04      | 4.68  |
| Market Cap (US\$m)        | 5,004.07  | 4,999.01  | 0.10  |
| Foreign Purchases (US\$m) | 1.203     | 1.192     | 0.90  |
| Foreign Sales (US\$m)     | 1.184     | 1.330     | 12.38 |
| Number of Trades          | 58        | 80        | 37.93 |

## ZSE held firm as Zimbabwe embarks on a new chapter...

In the wake of the presidential inauguration ceremony held yesterday in which the presidential elect courted foreign investors on a mutually beneficial basis, the ZSE held forth adding a marginal 0.41% gain to 183.93pts largely driven by gains of 7.50% in Innscor to close at 86c and Natfoods which closed firmer at 220c a 4.76% upsurge. President Mugabe emphasized the need to resuscitate the economy leveraging on the vast expanse of mineral deposits in the country. The minings index also recorded gains of 0.19% to 48.14pts on paltry trades in BNC which was the only active mining counter in the session.

### Top Risers

|   | Stock Name | Price  | % Δ   | YTD Δ % |
|---|------------|--------|-------|---------|
| 1 | NMBZ       | 8.00   | 33.33 | 23.08   |
| 2 | LAFARGE    | 120.00 | 9.09  | 71.43   |
| 3 | INNSCOR    | 86.00  | 7.50  | 22.86   |
| 4 | NATFOODS   | 220.00 | 4.76  | 66.67   |
| 5 | SEEDCO     | 77.00  | 2.67  | 0.00    |

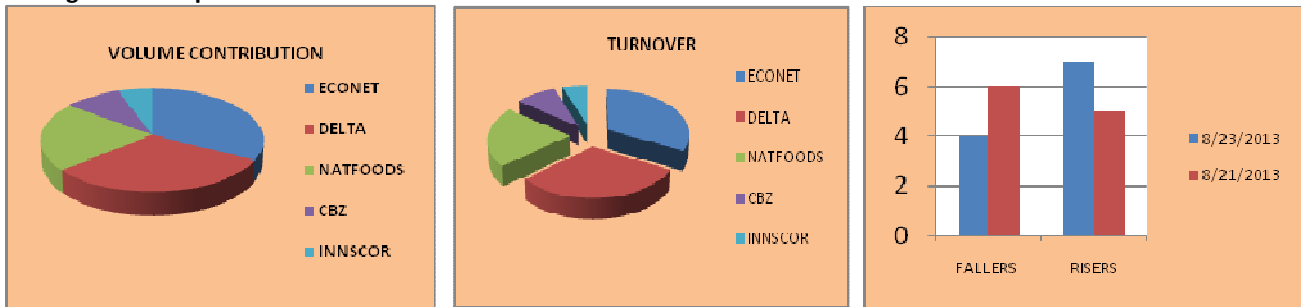
### Top Fallers

|   | Stock Name | Price  | % Δ   | YTD Δ % |
|---|------------|--------|-------|---------|
| 1 | ARTZDR     | 0.45   | 10.00 | 50.00   |
| 2 | DELTA      | 111.75 | 1.11  | 11.75   |
| 3 | PPC        | 230.00 | 0.86  | 15.00   |
| 4 | ECONET     | 49.99  | 0.02  | 11.09   |
| 5 | ABCH       | 60.00  | 0.00  | 9.09    |

Following the previous trading trend other market indicators headed southwards as recent heavy selloffs subsided. Volumes traded aggregated 4.5m shares indicating a fall of 48.9% with major contribution coming from Econet and CBZ which added 32% apiece. Value traded also took a dip, easing 4.68% to \$2.04m augured by Econet and delta who were both top traded stocks for the day.

On aggregate the market was net risers by 3 as risers topped 7 against 4 fallers. Leading the pack was NMBZ which added 33% to 8c while Lafarge rose 9% to 120c elsewhere Innscor firmed 7.5% to 86%. On the fallers were Art which shed 10% to 0.45c beverages giant Delta took a 1.1% nose dive to 111.75c. Econet lost 0.02% to 49.99c just as it unveiled a new 4G network into Zimbabwe to become the 1<sup>st</sup> provider to introduce such in Zimbabwe. Elsewhere foreign buys eased 0.9% to \$1.1 while foreign outflows upped 12% to \$1.3m

## Trading stats - Graphical



## Dividend Monitor

| COMPANY    | DIVIDEND TYPE | RECORD DATE | DATE PAYABLE | Date Declared |
|------------|---------------|-------------|--------------|---------------|
| OLD MUTUAL | Interim       | 27.09.13    | CUM DIV      | 07.07.13      |
| ABCH       | Interim       | 30.08.12    |              |               |
| FBCH       | Interim       | 06.09.13    | 24.09.13     | 23.08.13      |
| CBZH       | Interim       |             |              | 30.06.13      |

## 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 |
|         |       |                                |                  |
|         |       |                                |                  |

## Disclaimer:

This document has been prepared by EFE Securities (Private) Limited (EFE), for the information of its clients. Although the statements of fact in this report have been obtained from sources that the company believes to be reliable, we do not guarantee their accuracy, and any such information may be incomplete or condensed. All opinions and estimates included in this report constitute the company's judgment as of the date of this report and are subject to change without notice. The securities discussed and mentioned in this report may not be suitable for all investors. Investors must make their own investment decisions based on their specific investment objectives and financial position and using such independent advisors they believe necessary. This report is for informational purposes only and is not intended as an offer or solicitation with respect to the purchase or sale of any security. EFE and any of the individuals preparing this report may at any time have a long and/ or short position in any securities of companies in this report. In addition EFE may from time to time perform investment banking or other services for, or solicit investment banking or other business from any entity mentioned in this report. may at times buy and sell shares on an agency or principal basis to its clients. Shares may rise or fall and investors may end up with a reduced amount from their initial capital invested. Additional information on recommended securities is available on request.