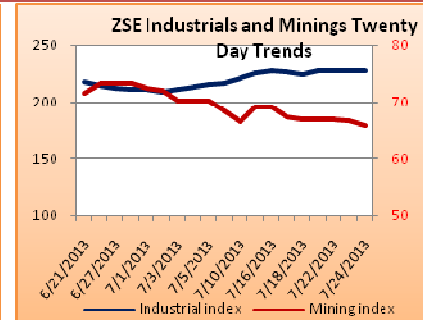
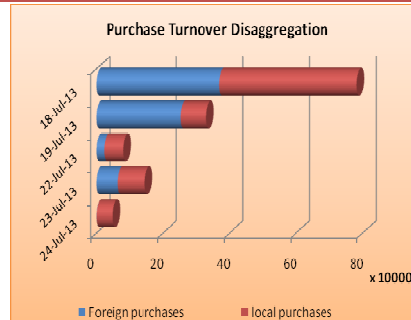
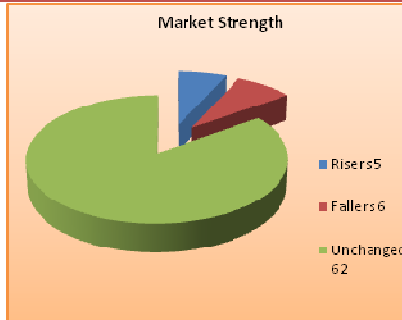




Daily ZSE market Report

24-July-2013



	23-Jul-13	24-Jul-13	% Δ
ZSE Industrials	227.28	227.10	0.08
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	66.93	66.70	0.34
Volume Traded (m)	3.40	3.71	9.07
Value Traded (US\$m)	1.45	0.49	66.11
Market Cap (US\$m)	6,336.77	6,327.74	0.14
Foreign Purchases (US\$m)	0.642	0.003	99.58
Foreign Sales (US\$m)	0.013	0.248	1817
Number of Trades	127	67	47.24

Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	ASTRA	6.00	33.33	20.00
2	DAWN	1.00	11.11	42.86
3	DAIRIBORD	24.00	3.90	14.29
4	ABCH	51.00	2.00	7.27
5	BARCLAYS	6.50	1.40	150.00

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	FALGOLD	9.00	25.00	25.00
2	NMBZ	9.00	18.18	38.46
3	COLCOM	35.00	12.50	40.00
4	POWERSPEED	1.90	5.00	35.71
5	AFDIS	35.00	2.78	133.33

ZSE slows in mid week session...

Activity eased in Wednesday trades with turnover dipping 66.1% to \$0.49m and volumes down 9.07% to 3.71m shares. Foreign investors were also on the sidelines with inflows of \$2,718 and outflows of \$248,835 being recorded. Consequently the industrial index slipped by a marginal -0.08% to 227.10pts. Weighing on the market were losses of -2.8% and -12.5% in Afdis and Colcom respectively with both settling at 35c having reversed yesterday's gains. Banking group NMBZ succumbed -18.2% to 9c on \$270 worth of trades while electrical engineering and hardware retailer Powerspeed slid -5% from its peak price of 2c. The Mining index shed -0.94% to 65.76 pts on the back of losses in gold miners Falgold which gave up -25% to 9c as the group continue to struggle after poor results to March 2013 on the back of declining international gold prices. Coal Miners Hwange gave up -0.6% to 17.5c.

Astra which experienced major shareholder changes recently surged +33% to 6c as the stock regains market confidence. Hotel property owner Dawn and milk processors DZHL rerated +11.1% to 1c and +3.9% to 24c on strong demand. Similarly banks ABCH and Barclays added respective gains of +2% to 51c and +1.4% to 6.5c.

Beverages group Delta was stable at 143c after releasing its Q1 trading update that indicated increases of 8% and 4% to revenues and volumes respectively. The group hinted that earnings growth going forwards will be dependent on the GDP trends particularly in the post harmonized elections period.

UPCOMING EVENTS

Company	Event	Venue	Date & Time
CFI	EGM	Royal Harare Golf Club	26 July 1100 HRS
Econet	AGM	Econet Park	30 July 1000 HRS

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