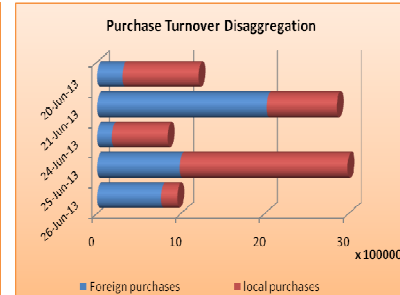
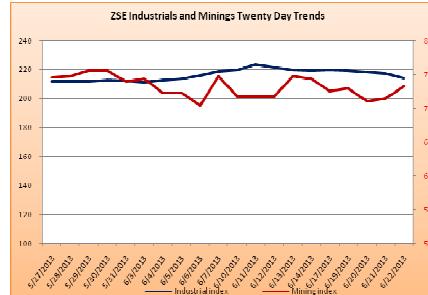
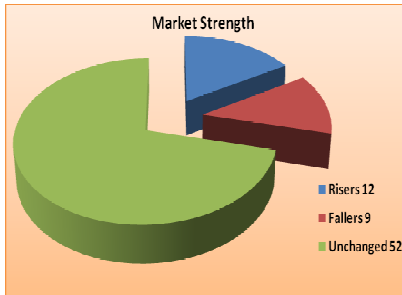




# Daily ZSE market Report

26-June-2013



	25-Jun-13	26-Jun-13	% Δ
ZSE Industrials	215.24	214.43	0.38
ZFN top ten	155.76	155.76	0.00
ZFN Banking index	78.63	78.63	0.00
ZSE Mining	73.29	73.29	0.00
Volume Traded (m)	11.89	11.89	0.00
Value Traded (US\$m)	2.98	0.95	68.03
Market Cap (US\$m)	6,064.61	5,996.32	1.13
Foreign Purchases (US\$m)	0.987	0.760	23.04
Foreign Sales (US\$m)	0.318	0.763	139.96
Number of Trades	83	74	10.84

## Industrials fall in mixed trades...

Mixed trading was witnessed on the market today with the industrials falling -0.38% to 214.43pts on selling pressure in heavy weight stocks. This was also on the back of investors taking a wait and attitude as political developments unfold. Top capitalized stocks which faltered were Delta -1.4% softer to 146c, Inncor -0.6% lower at 90.5c, Old Mutual down -2.5% to 230c and PPC -2.4% softer at 245c. African Sun was the leading faller with its -13.04% decline ahead of its interims today. The bearish sentiment saw tyres manufacturer NTS shedding -9.5% to 2.1c with buyers remaining at its support price of 2c. Bankers NMB slid -5.6% on paltry trades while short-term insurer Nicoz Diamond eased -3.2% to 1.5c.

### Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	PIONEER	8.00	60.00	700.00
2	COLCOM	30.00	15.38	20.00
3	PADENGA	6.60	11.86	46.67
4	TURNAL	5.50	10.00	0.00
5	HIPPO	115.00	4.55	3.60

### Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	AFRICAN SUN	2.00	13.04	122.22
2	NTS	2.10	9.48	30.00
3	NMBZ	8.50	5.56	30.77
4	NICOZ	1.50	3.23	7.14
5	OLDMUTUAL	230.00	2.54	51.32

Several gainers mitigated the losses for the day, top of the list Pioneer amassed +60% to 8c bringing its YTD return to 700%. Inncor subsidiary Colcom and associated company Padenga went up ahead of their June year end adding +15.4% to 30c and +11.9% to 6.6c respectively. The range bound Turnall gained +10% to its top end price of 5.5c while sugarcane processor Hippo advanced +4.6% to 115c. Increasing demand saw spirits manufacturer Afdis and cigarette manufacturer BAT reaching all time highs of 32c and 931c respectively. AICO rose +2.6% to 7.5c as it renewed its cautionary on series of transactions being considered and also ahead of its finals on Friday.

Turnover of the day was down -68% to \$0.95m. Foreign demand waned -23% to \$0.8m while foreign sales surged +140% to \$0.8m. Minings were unchanged at 73.29pts with the only trade in the sector taking place in Hwange at prior price of 17.5c.

**UPCOMING EVENTS**

Company	Event	Venue	Date & Time
BARCLAYS	AGM	Cresta Lodge	26 June 1500 HRS
PIONEER	AGM	14-16 Hermes Road, Southerton	27 June 1000 HRS
TA	AGM	Sango Conference Centre, Cresta Lodge	27 June 1100 HRS
ZIMPAPERS	AGM	Zimpapers 6 <sup>th</sup> Floor Boardroom, G Silundika/S Nujoma	27 June 1200 HRS
FBC	AGM	Harare Golf Club	27 June 1200 HRS
FBC	EGM	Harare Golf Club	27 June 1230 HRS
HWANGE	AGM	Boardroom, 7 <sup>th</sup> Floor, Coal House	28 June 1030 HRS
PGI	AGM	Zimtile (Private) Limited Offices, Lonchivar	28 June 1200 HRS
OK ZIMBABWE	AGM	OK Mart Functions, 30 Chiremba Road	19 July 1000 HRS

**CAUTIONARY STATEMENTS/CIRCULARS ISSUED**

Company	Date Issued / reissued	Description
ASTRA	02may 2013	Negotiations ongoing about the possible acquisition of RBZ's stake in the group
AICO	15 February 2013	Renewal of cautionary statement about a series of transactions that may impact on group structure (possible unbundling of the group)
CFI	8 January 2013	The cautionary was renewed with the directors advising Shareholders to exercise caution in trading the shares. The firm is involved in restructuring exercise-seeking investors for the poultry division.
STAR AFRICA	17 January 2013	Cautionary statement was reissued that the management is engaged in discussions that may have material impact on value of shares
ARISTON	23 may 2013	The cautionary was renewed with the directors advising Shareholders to exercise caution in trading the shares.
ZBFH	10 April 2013	Cautionary notice to shareholders on negotiations
PELHAMS	8 April 2013	Profit warning for the financial year to march 2013

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