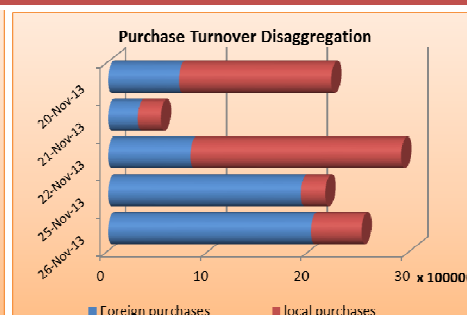
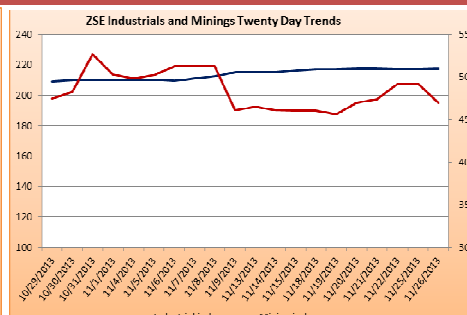
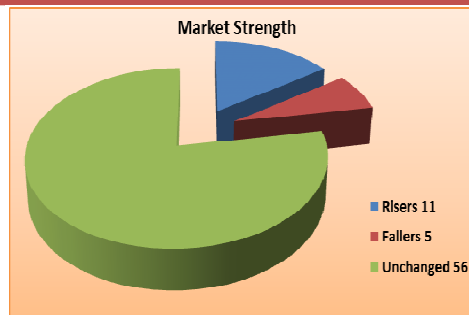




Daily ZSE market Report

Members of the Zimbabwe Stock Exchange

26-Nov-2013



	25-Nov-13	26-Nov-13	% Δ
ZSE Industrials	216.93	217.60	0.31
ZSE Mining	45.23	47.02	3.96
Volume Traded (mn)	7.74	5.57	28.03
Value Traded (US\$ mn)	2.16	2.52	16.64
Market Cap (US\$ mn)	5,979.82	5,974.21	0.09
Foreign Purchases (US\$ mn)	1.916	2.015	5.19
Foreign Sales (US\$ mn)	0.850	1.646	93.59

Industrials recovers in sideways trading...

The mainstream Industrial Index closed today's session on the upside effectively reversing yesterday's losses. The session characterized by sideways trading in heavy caps resulted in a 0.31% gain to 217.60pts for the industrials. Gains in Delta (+1.14%), BAT (+2.4%) and Seedco (0.1%) to 153.02c, 1280c and 91.1c respectively outweighed the losses in Natfoods (-2.3%), Old Mutual (-1.8%) and Innscor (-0.6%). Bindura led the minings resurgence of 3.96% to 47.02pts after firming 11% to 2c. Rio Zim was stable at 32c to cap the activity in the resources.

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

Top Risers

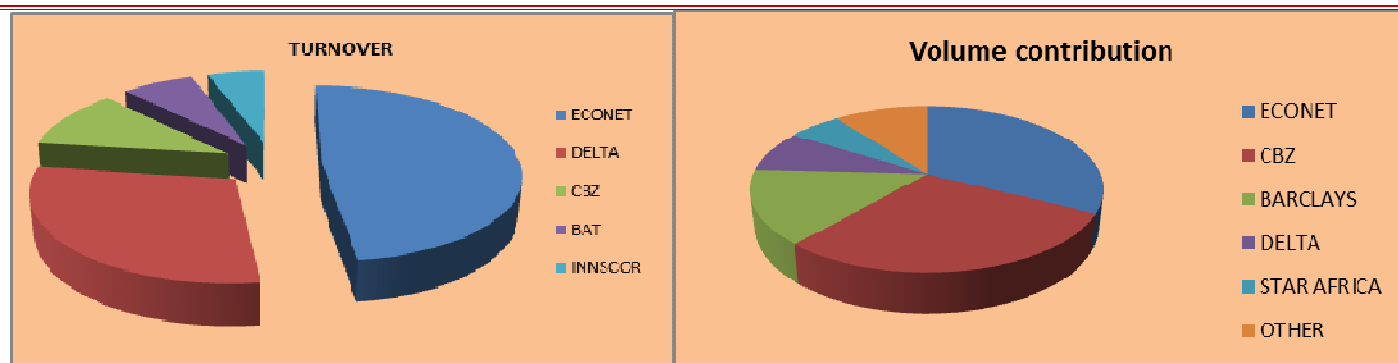
	Stock Name	Price	% Δ	YTD Δ %
1	NICOZ	2.00	33.33	42.86
2	INTERFRESH	0.50	25.00	150.00
3	BINDURA	2.00	11.11	83.33
4	AFRICAN SUN	2.80	7.69	211.11
5	BARCLAYS	4.90	6.52	88.46

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	FBCH	12.85	4.81	71.33
2	MEIKLES	25.00	3.85	66.67
3	NATFOODS	215.00	2.27	62.88
4	OLDMUTUAL	275.00	1.79	80.92
5	INNSCOR	84.49	0.60	20.70

Econet was unchanged at 62c as the diversified telecoms group which recently added Ecocash save mobile banking platform to its product offering announced that the facility will advance loans to account bearers. In the session 11 counters closed in the money while only 5 weakened from a total 27 active counters. Nicoz led the gainers with an upsurge of 33% to 2c followed by Interfresh which rose 25% to 0.5c. Barclays was up 6.5% at 4.9c and closed on a higher bid of 4.7c. African sun which is trading under caution after a series of recently concluded shareholder transaction surged 7.7% to 2.8c.

Banking group FBCH was the worst faller easing 4.8% to 12.85c amid rumors of a cash crisis in the banking sector compounded swelling anxiety around budget announcement delays. The budget's statutory deadline for announcement is the 31st of January of the calendar year and this should give government a reprieve to source external relief to support the budget. Meikles was down 3.8% to 25c. Value trades remained impressive beyond the \$2m mark adding 17% on yesterday's level to \$2.5m on volumes of 5.57m shares. Econet emerged as the top traded stock by value with a 45% contribution with the bulk being snapped by foreign buyers in deals worth \$1.1m. Overall foreign purchases were 80% of the total turnover and was 5% up on yesterday at \$2,0m while outflows improved 93.6% to \$1.6m leaving the funds flow in a net inflow position



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
MEIKLES	EGM	STEWARD ROOM, MEIKLES HOTEL	27 NOV - 9.00 AM

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