



	28-Nov-13	29-Nov-13	% Δ
ZSE Industrials	215.24	213.04	1.02
ZSE Mining	47.02	47.02	0.00
Volume Traded (mn)	1.23	5.85	374.72
Value Traded (US\$ mn)	0.50	1.32	165.03
Market Cap (US\$ mn)	5,995.37	7,130.38	18.93
Foreign Purchases (US\$ mn)	0.017	0.829	4770.41
Foreign Sales (US\$ mn)	0.000	0.122	0.00

ZSE shrinks in weekend trading despite a rebound in activity...

The much fairer industrials index was weaker in Friday trades on heavy cap losses. The index suffered a loss of 1.02% to 213.04pts weighed down by falls in heavy caps OK and Innscor. The retailer eased 13.04% to 20c and ended with lower bid of 18c while Innscor receded 5.3% to 80c. Despite the losses the risers outnumbered losers by 5 to 3. The minings for the 4th straight session was unchanged at 47.02 pts with only Bindura being consistent in activity all week, trading at previous close of 2c.

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

Top Risers

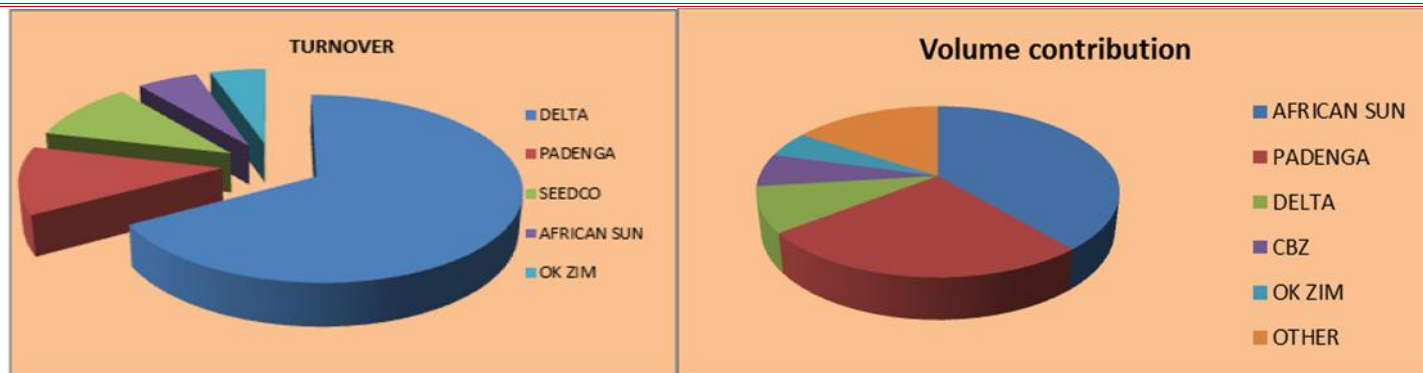
	Stock Name	Price	% Δ	YTD Δ %
1	TURNAL	5.50	22.22	0.00
2	PADENGA	9.00	5.88	100.00
3	ZHL	1.50	4.17	25.00
4	AFRICAN SUN	2.80	3.70	211.11
5	TSL	36.00	2.83	213.04

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	OK	20.00	13.04	33.33
2	INNSCOR	80.00	5.31	14.29
3	FBCH	12.50	2.72	66.67
4				
5				

FBCH capped the three bearson the market today after losing -2.72% to 12.5c despite reports that the central bank will not renew the MoU signed between itself and the financial institutions and is expected to cease with effect from the 1st of December. FBCH said the bank would have realized an additional \$2.5m in the 6 months to June 2014 had it not been for the MoU. Meanwhile the banks subsidiary Turnall topped the opposite end of the cluster with a 22% gain to 5.5c albeit on a paltry volume of 9,000 shares . The rise comes after reports that it is nearing the targeted 45,000 tiles per day capacity at newly commissioned tiles making plant. Padenga and African sun were up 6% and 3.7% to 9c and 2.8c respectively. Delta ended stable at 150c and Econet followed suit at 62.2c. Meikles which says it has invested \$25m into its subsidiary Tanganda Tea limited since last year, was also unchanged at 25c. Aico which issued a circular regarding its proposed unbundling of the company remained stable at 6.5c.

Activity was relatively enhanced compared to yesterday with value surging 165% to \$1.32m, albeit from a low base, on volumes of 5.85m shares. The improvement in activity was boosted by foreign participation which was absent in the prior session. Foreign purchases stood at \$0.83m and was 63% of the aggregate value traded with Delta being the most sought after stock. Foreign outflows were \$0.12m resulting in a net foreign inflow of \$0.7m.



Dividend Monitor

<u>Company</u>	<u>Dividend Type</u>	<u>Div Amount</u>	<u>Record date</u>	<u>Payment Date</u>
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

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Date & Time</u>
CBZ	Nil cost dealing facility (NCDF)	CLOSES	01 DEC 2013

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