



05-Aug-14 06-Aug-14 % Δ

Industrials maintain surge to close in on year opening levels ...

ZSE Industrials	190.46	192.32	0.98
ZSE Mining	90.02	83.27	7.50
Volume Traded (mn)	4.62	45.01	873.31
Value Traded (US\$ mn)	0.80	1.15	44.50
Market Cap (US\$ mn)	5,433.22	5,443.78	0.19
Foreign Purchases (US\$ mn)	0.508	0.862	69.72
Foreign Sales (US\$ mn)	0.208	0.199	4.05

The Industrial Index stretched daily gains by a further 0.98% to close at 192.32 points to reduce its year to date loss to just -4.85%. Driving the index's upsurge were heavy cap's which numbered a total 5 counters from an overall 14 risers to affirm a prevailing improved demand across the board. The top 3 heavily capitalised stocks on the exchange all made it to the elite risers as Delta accrued 0.77% to 128c while Econet and Innscor soured 0.94% and 5.26% to 71.72c and 80c respectively.

The Mining Index however continued to experience a reverse trend dragged by Bindura. The index came off a pricey 7.5% to close at 83.27 points as profit taking in Bindura heightened. The stock forego 11.39% to close at 7c while closing net sellers at that level indicating near term weakness. Falgold went up 21.52% to 4.01c but failed to influence the market's direction while Hwange recorded an improvement in its bid price to 6c which proved too little to entice sellers.

The market strength remained positive as 14 counters rose in comparison to a minor 4 which fell in price levels. Gains were largely composed of mid tiers though heavy caps provide the weight to guarantee an upsurge. Radar was the top performer on a 100% gain to 4c and was trailed by Masimba which went up 49% to 3.5c to maintain an upwards trajectory on surging demand. RTG exchanged 23.08% firmer at 1.6c while CFI capped the top risers after notching 19.05% to close at 2.5c. Among the fallers were NMBZ which put up a worst performance after losing 33.3% to 4c. Meikles pared 2.7% to 18c while Colcom went down 1.5% to 26c.

Both value and volume aggregates trended upwards as activity generally ticked up. Turnover came in at \$1.15m which is 44.5% up on the prior levels while volume went up to 45.01m shares spurred by a block trade in Dawn which accounted for 84% of the overall volume traded. Likewise Dawn topped value contributors followed by Econet and BAT. Foreign demand improved by 70% as purchases worth \$0.86m were realised against foreign sales worth \$0.199m which was -4% lower than yesterday. Foreign appetite was highly concentrated in top cap counters Innscor, Delta and Econet.

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

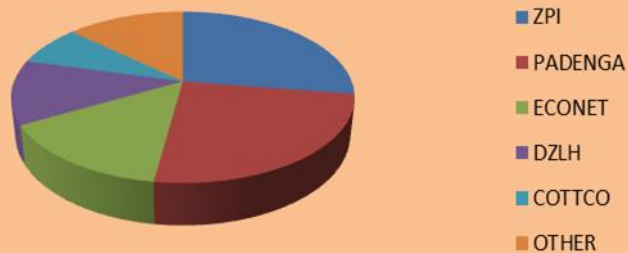
Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	RADAR	4.00	100.0	50.00
2	MASIMBA	3.50	48.94	46.15
3	RTG	1.60	23.08	0.00
4	FALGOLD	4.01	21.52	19.80
5	CFI	2.50	19.05	30.56

Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	NMBZ	4.00	33.33	250.00
2	BINDURA	7.00	11.39	250.00
3	MEIKLES	18.00	2.70	5.26
4	COLCOM	26.00	1.55	18.18
5				

Volume contribution



TURNOVER



DIVIDEND MONITOR

Company	Dividend Type	Div Amount	Record date	Payment Date
BAT	Interim	30c	22.08.14	22.09.14

UPCOMING EVENTS

Company	Event Type	Location	Date	Time
FALGOLD	EGM	1 st FLOOR KPMG HOUSE 133 J TONGOGARA ST BYO	13/08/2014	1000HRS
BNC	AGM	CHAPMAN GOLF CLUB HARARE	28/08/2014	0930HRS
SEEDCO	AGM	SEEDCO ADMIN BLOCK STAPLEFORD HARARE	20/08/2014	1200HRS
NTS	AGM	BOARD ROOM CNR CRISSP/SEKE	20/08/2014	1430HRS
ART	EGM	202 SEKE ROAD, GRANITESIDE HARARE	26/08/2014	1100HRS
COTTCO	AGM	RAINBOW TOWERS, JACARANDA	29/08/2014	1130HRS

CAUTIONARIES

Company	Issue Date	Subject
AFRICAN SUN	6 th DEC 2013	Discussions on mandatory offer to minorities by Lengrah Investments
Nicoz & ZHL	11 th Apr 2014	Negotiations over acquisitions and disposal respectively, of a business
FALGOLD	21 st MAY 2014	Negotiations that may have material effect on the company's stocks price
HUNYANI	22 nd MAY 2014	Negotiations that may have material effect on the company's stocks price
BINDURA	13 th JUNE 2014	H2 Profit expected to substantially higher than H1 outturn
TAH	24 th JUNE 2014	Negotiations that may have material effect on the company's stocks price
COTTCO	24 th JUNE 2014	Negotiations that may have material effect on the company's stocks price
ASTRA	23 rd June 2014	Possible Offer to minorities by new major shareholders Hermister investments

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