



Members of the Zimbabwe Stock Exchange

Market Comment 01.08.2019

Index	Previous	Today	Move pts	Change %
Industrial	624.41	620.00	4.41	0.71
Mining	244.57	244.57	0.00	0.00
ZSE 10	175.98	174.22	1.76	1.00
ZSE ALL SHARE	187.12	185.81	1.31	0.70

SOURCE: ZSE

ZSE commences new month in losses...

ZSE continued to falter in the new month as heavies traded sideways. The primary All Share Index retreated 0.70% to 185.81pts while, the Industrials lost 0.71% to end lower at 620pts. The ZSE Top Ten Index slipped 1% to close at 174.22pts while, the resources index remained stable at 244.57pts. Property concern Mash led the losers of the day having succumbed 15.80% to \$0.0421 while, construction group Masimba let go 11.11% to settle at \$0.0800. Brick manufacturers Willdale trimmed 9.09% to \$0.0300 while, banking group NMB declined 6.32% to \$0.2623. Padenga sealed the top five fallers of the day after a 2.57% loss to \$1.8000.

Banking group CBZ led the gainers of the day with a 11.32% surge to \$0.5477, followed by Insurer FML which ticked up 0.20% to \$0.2545. Old Mutual added 0.15% to settle at \$16.2971 while, Fidelity completed the top five risers of the day after gaining 0.12% to \$0.0841. Seventeen counters registered price movements distributed as four risers and thirteen fallers to register a negative market breadth of nine. Activity aggregates were subdued as volumes dropped 45.90% to 5.47m shares while, turnover dipped 77.73% to \$3.34m. Top volume drivers of the day were Mash (25.04%), CBZ (24.75%) and Star Africa (14.64%). Values were anchored by CBZ, PPC, Delta, Old Mutual and Hippo which claimed a combined 78.56% of the outturn.

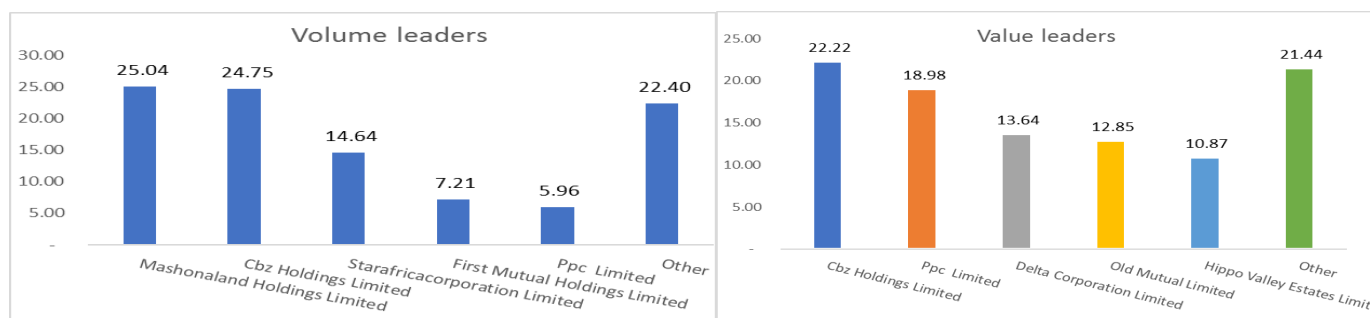
Market Snapshot	Today	Previous	Change
Market Cap US\$	24,456,483,261	24,636,140,660	0.73
Turnover US\$	3,337,394.11	14,987,957.82	77.73
Foreign buys US\$	550,474.40	13,117.54	4096.48
Foreign sales US\$	176,669.00	0.00	-
No. of trades	116	93	24.73
Volume	5,466,589.00	10,104,735.00	45.90

Today's Gainers	Price	Change	% Change
Cbz Holdings Limited	54.77	5.57	11.32
First Mutual Holdings Limited	25.45	0.05	0.20
Old Mutual Limited	1,629.71	2.40	0.15
Fidelity Life Assurance Limited	8.41	0.01	0.12

Today's Losers	Price	Change	% Change
Mashonaland Holdings Limited	4.21	0.79	15.80
Masimba Holdings Limited	8.00	1.00	11.11
Willdale Limited	3.00	0.30	9.09
Nmbz Holdings Limited	26.23	1.77	6.32
Padenga Holdings Limited	180.00	4.75	2.57



Volume and value drivers



OLD MUTUAL ZIMBABWE

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	VOL TRADED	HIGH (YTD)	LOW (YTD)	
OMZIL	\$16.2731	0.45	\$16.2500	1,300	\$17.2500	\$4.5000	\$170,174,021.90

Dividend Monitor

Counter	LDR	Rate	Payment Date
Mash	09.08.19	\$0.0079	16.08.19
Zimplot	16.08.19	\$0.0147	19.08.19

Upcoming Events

Company	Event	Venue	Time	Date
SeedCo International	AGM	Avani Gaborone Resort & Casino, Botswana	1200hrs	09.08.19
SeedCo Limited	AGM	1 North-end close, Northridge park, Borrowdale	1200hrs	15.08.19
Border timbers	EGM	Northern Tobacco Ltd Complex, 4-12 Paisley, Southerton, Harare	0900hrs	04.09.19

Cautionaries

Simbisa	24.07.17	Board has approved, subject to RBZ, regulatory and shareholder's approval, the application for a secondary listing on LSE (AIM)
RioZim	01.11.18	Further cautionary reporting that three of its mines have involuntarily stopped operations until sufficient foreign currency can be accessed.
ZHL	31.07.19	The company is engaged in negotiations that involve a potential transaction that may have a material impact on the price of the company's shares.
Meikles	20.03.19	The discussions to sell certain hospitality assets are on-going and the company will seek approval from shareholders for the proposed disposal.
Padenga	09.04.19	The company is considering a proposed transaction to diversify its business through investment into an alternative export-oriented business.
Getbucks	29.04.19	The company is contemplating a capital raising transaction which if successful will have a material effect on the share price.
AfriSun	03.05.19	Company announces termination management agreement with the Legacy Hospitality Management services Ltd.
Fidelity	19.07.19	The company is engaged in negotiations that involves restructuring the company's capital structure through the issue of shares and this might have a material impact on the value of shares.

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