

	02-Jul-15	03-Jul-15	% Δ
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ZSE Industrials	146.23	146.20	0.02
ZSE Mining	39.64	39.76	0.30
Volume Traded (mn)	48.26	0.47	99.02
Value Traded (US\$ mn)	1.85	0.20	88.94
Market Cap (US\$ mn)	4,049.83	4,008.73	1.01
Foreign Purchases (US\$ mn)	1.236	0.023	98.13
Foreign Sales (US\$ mn)	0.858	0.099	88.51

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

Top Risers

	Stock Name	Price	% Change	YTD Δ %
1	MEIKLES	8.00	14.29	44.83
2	INNASCOR	60.01	0.02	0.02
3				
4				
5				

Top Fallers

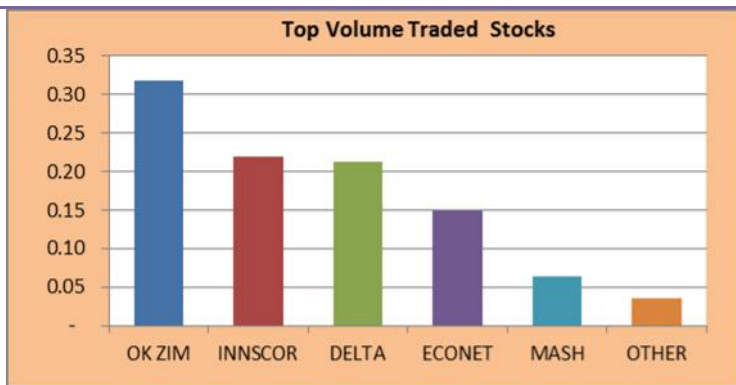
	Stock Name	Price	% Δ	YTD Δ %
1	FALGOLD	0.80	68.00	73.33
2	PADENGA	10.00	5.75	11.11
3				
4				
5				

Thinly traded session ahead of automated trading...

It was a thinly traded week ending session as the market eagerly anticipated the market automation of the bourse initially penciled for today but was deferred. Volumes of the day subsided 99.02% to 0.47mn shares while, turnover slipped 88.94% to \$0.2mn with no outlying trades as experienced in the previous two days. Top capitalized stocks maintained their pole position in values traded with contributions of 49.5% in Delta, 30.7% in INNASCOR and 12.2% in ECONET and OKZIM 5.9%. The above quartet also led in the volumes of the day. Foreign participation diminished in consistence with the above aggregates with purchases down 98.13% to \$0.23mn contributed by ECONET while sales dropped 88.51% to 0.099mn and coming from DELTA.

The Industrial Index eased a modest 0.03pts or 0.02% to 146.20pts dragged by PADENGA that lost steam shaving 5.75% to 10c. The Industrial loss of the day was mitigated by MEIKLES that jumped 14.29% to 8c and INNASCOR that scratched 0.02% to 60.01c on renewed buying. Meanwhile DELTA and ECONET were stable at 100c and 35c with sell-offs still evident in both of them. The Mining Index was up 0.12pts or 0.30% to 39.76pts on an improved bid of 4c in HWANGE in an effort to induce supply. This rise was however negated by FALGOLD that fell 68% to 0.80c. ROZIM which today announced the 67% subscription for its recently completed renounceable rights issue was steady at 14c while, BINDURA was inactive and quoted 3.2 – 3.5c.

In company news, holding company MEIKLES released its finals to 31 March 2015 highlighted by an operating loss of \$10.37mn and loss for the year of \$34.49mn largely weighed down by \$12.53mn financing costs, \$4.7mn impairment of investment in Mentor Africa Limited, \$9mn loss on discounting RBZ Bills and \$14.71mn provision for discount in RBZ balances. However, post reporting period the company reported that it entered into an agreements to offload its RBZ Bills to the nominal value of \$37.6mn and will have no further Treasury Bills to sell.



DIVIDEND MONITOR

COMPANY	DIV TYPE	DIV AMOUNT	RECORD DATE	PAYMENT DATE
ECONET	Final	0.31c	17.07.15	24.07.15
SEEDCO	Final	1c	26.06.15	29.07.15

UPCOMING EVENTS

COMPANY	EVENT	VENUE	DATE	TIME
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CAUTIONARIES

COMPANY	ISSUE DATE	SUBJECT
RIOZIM	Mar-15	Capital raise- rights issue
DAWN	Apr-15	Compiling offer to minorities as major shareholders now control 61% of shares
STAR AFRICA	Apr-15	Negotiations underway that may have a material impact on its share value
INNSCOR	June-15	Approved the unbundling of the Company's Quick Service Restaurant
NICOZ	June-15	Discussions underway that may have a material impact on its share value
ZB FINANCIAL	July-15	Profit warning-profitability in 4 months to April 2015 above budget

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