

Market Comment 04.09.2017

| Index | Previous | Today | Move pts | Change % |
|-------------------|----------|--------|----------|----------|
| Industrial | 238.00 | 243.72 | 5.72 | 2.40 |
| Mining | 74.05 | 74.05 | 0.00 | 0.00 |

SOURCE: ZSE

Industrial continues to firm on market wide demand...

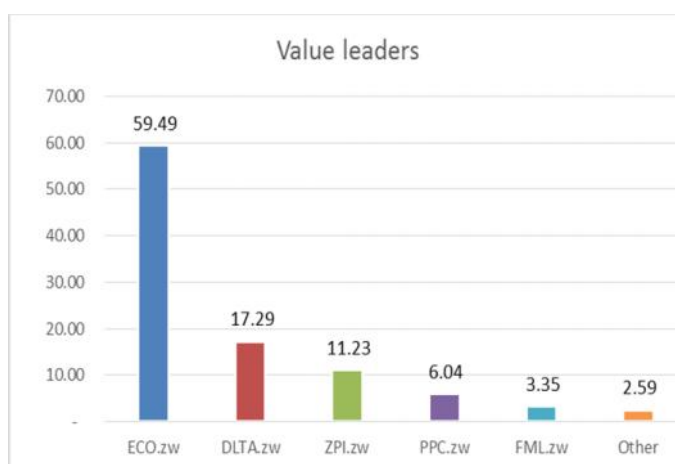
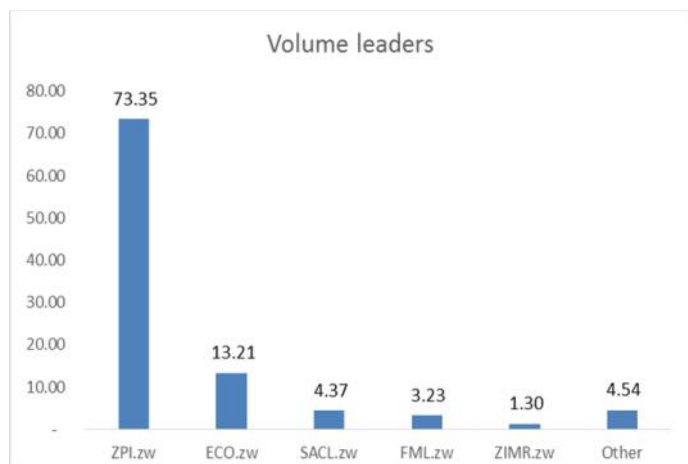
Bullish sentiment persisted on the ZSE driving the Industrial Index higher with a 2.40% surge to touch an all time of 243.72pts. New highs were recorded in heavies Delta, Hippo, SeedCo and property stocks Dawn and ZPI. Topping the gainers of the day was cable manufacturer Cafca which rose by an impressive 20% to \$0.2400, Hippo followed with a 19.79% uptick to \$1.1500. PPC traded 6.54% higher at \$0.7800 while, top capitalised stock Delta put on a hefty 5.09% to close at a vwap of \$1.4985, having traded at an intra-day high of \$1.5000, on persisted demand. SeedCo completed the top five gainers of the day with a 4.08% lift as the seed producer settled at \$1.8125. Innscor and Econet were amongst the gainers to drive the Index northwards as the duo added 1.26% and \$0.004% to close at \$0.8025 and \$0.5000. On the negative side were the duo of Willdale and CFI which slumped 12.50% and 8.36% to see their shares being swapped lower at \$0.0035 and \$0.6300.

Today's market indicators reflected a mixed outturn as values yielded rose 20.46% to \$1.51m while volumes dropped 9.66% to 13.63m. ZPI emerged the top volume driver, claiming 73.35% of the aggregate while Econet and Delta anchored the value outturn with respective contributions of 59.49% and 17.29%. Capital flight continues on the bourse, as no inflows were recorded in the session against outflows of \$0.67m. The Mining Index was flat at 74.05pts with no activity in the resources sector.

| Market Snapshot | Today | Previous | Change |
|---------------------------|---------------|---------------|--------|
| Market Cap US\$ | 6,903,183,127 | 6,743,175,599 | 2.37 |
| Turnover US\$ | 1,513,771 | 1,256,655 | 20.46 |
| Foreign buys US\$ | 0 | 60,973 | 100.00 |
| Foreign sales US\$ | 671,866 | 1,163,534 | 42.26 |
| No. of trades | 56 | 50 | 12.00 |
| Volume | 13,633,796 | 15,091,997 | 9.66 |

| Today's Gainers | Price | Change | % Change | Today's Losers | Price | Change | %Change |
|-----------------|--------|--------|----------|----------------|-------|--------|---------|
| CAFCA.zw | 24.00 | 4.00 | 20.00 | WILD.zw | 0.35 | 0.05 | 12.50 |
| HIPO.zw | 115.00 | 19.00 | 19.79 | CFI.zw | 63.00 | 5.75 | 8.36 |
| PPC.zw | 78.00 | 4.79 | 6.54 | | | | |
| DLTA.zw | 149.85 | 7.26 | 5.09 | | | | |
| SEED.zw | 181.25 | 7.10 | 4.08 | | | | |

Volume and value drivers



OLD MUTUAL ZIMBABWE

| Counter | PRICE(VWAP) | % CHANGE | LAST TRADED | VOL TRADED | HIGH (YTD) | LOW (YTD) | MARKET CAP |
|---------|-------------|----------|-------------|------------|------------|-----------|-----------------|
| OMZIL | \$0.8207 | 0.0000 | \$0.8207 | - | \$0.8210 | \$0.8205 | \$68,127,716.96 |

Dividend Monitor

| Counter | LDR | Rate | Payment Date |
|---------|-----|------|--------------|
|---------|-----|------|--------------|

Upcoming Events

| Company | Event | Venue | Time | Date |
|---------|-------|--|---------|----------|
| FML | EGM | Royal Harare Golf Club | 1000hrs | 31.08.17 |
| ECONET | AGM | Econet Park, 2 Old Mutare Road, Msasa) | 1000hrs | 31.08.17 |
| NTS | AGM | | 1400hrs | 27.11.17 |
| SEEDCO | AGM | SeedCo Administration Block Stapleford | 1000hrs | 28.11.17 |

Cautionaries

| | | |
|--------|----------|--|
| Colcom | 10.05.17 | Innscor, to offer minority shareholders to purchase Colcom shares in exchange for its shares and possible voluntary delisting of the Colcom. |
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Members of the Zimbabwe Stock Exchange

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|----------------|----------|--|
| Simbisa | 24.07.17 | Board has approved, subject to RBZ, regulatory and shareholder's approval, the application for a secondary listing on LSE (AIM). |
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