



## RESEARCH – MARKET COMMENT

### Market Comment 06.10.2020

Index	Previous	Today	Move pts	Change %
Industrial	5,188.47	5,188.07	0.40	0.01
Mining	3,785.30	3,785.30	0.00	0.00
ZSE 10	1,039.98	1,032.93	7.05	0.68
ZSE ALL SHARE	1,575.51	1,575.39	0.12	0.01

SOURCE: ZSE

### ZSE closes with marginal losses...

The ZSE benchmark indices closed Tuesday's session in marginal losses as the ZSE All Share Index and the Industrial Index trimmed a similar 0.01% to end at 1,575.39pts and 5,188.07pts, respectively. The blue chips Index was down 0.68% to 1,039.98pts weighed down by losses in selected heavies. The Mining Index was stable at 3,785.30pts. Art was the major casualty of the day with a 6.81% loss to \$2.0945, followed by banking group CBZ that shed 3.23% to \$15.0000. Telecoms giant Econet dropped 1.70% to \$4.7233 while, crocodile skin producers Padenga let go 1.33% to close at a vwap of \$14.6989. Brick manufacturers Willdale completed the top five shakers of the day after retreating 0.96% to \$0.2278.

Mash holdings led the loss mitigating pack as it surged 19.76% to \$.6000 while, property concern FMP trailed on a 7.64% rise to \$2.2000. Hippo added 5.94% to close at \$13.9839 while, fast foods group Simbisa improved 3.87% to \$6.7000. Conglomerate Meikles capped the top five risers of the day on 3.83% gain to \$15.0000. Losers of the day outnumbered gainers by a count of four leaving the market with a negative breadth. Activity aggregates were mixed in the session as seen in volumes that dropped 19.38% to 2.69m shares while, value outturn put on 9.84% to \$24.59m. Volume drivers of the day were Delta, Nampak and Econet which claimed a combined 56.13% of the aggregate. Value outturn was anchored by Delta and Innscor with respective contributions of 44.14% and 15.57% to the total. Foreign outflows stood at \$10.44m with no foreign inflows in the session, leaving the market with a net funds outflow position.

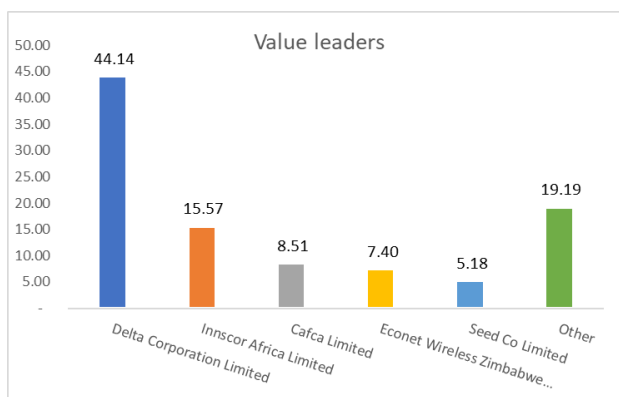
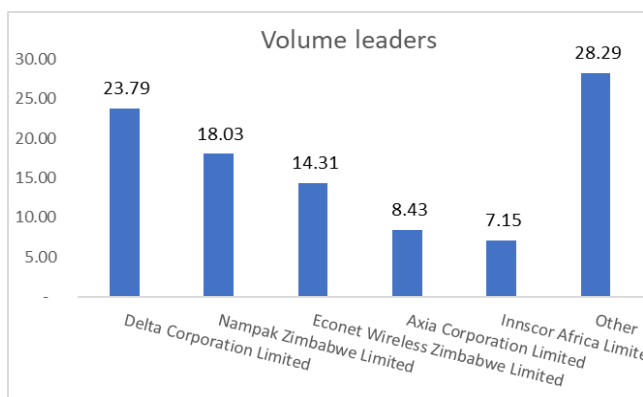
Market Snapshot	Today	Previous	%Change
Market Cap ZWL \$	199,027,427,630	199,127,199,717	0.05
Turnover ZWL \$	24,593,489.81	22,391,033.02	9.84
Foreign buys ZWL \$	0.00	103,160.00	100.00
Foreign sales ZWL \$	10,441,612.00	917,620.09	1037.90
No. of trades	176	189	6.88
Volume	2,692,817	3,340,001	19.38

Today's Gainers	Price	Change	% Change
Mashonaland Holdings Limited	60.00	9.90	19.76
First Mutual Properties Limited	220.00	15.62	7.64
Hippo Valley Estates Limited	1,398.39	78.39	5.94
Simbisa Brands Limited	670.00	24.96	3.87
Meikles Limited	1,500.00	55.33	3.83

Today's Losers	Price	Change	% Change
Amalgamated Regional Trading (Art) Holdings Limited	209.45	15.30	6.81
Fbc Holdings Limited	1,500.00	50.00	3.23
Econet Wireless Zimbabwe Limited	472.33	8.15	1.70
Padenga Holdings Limited	1,469.89	19.84	1.33
Willdale Limited	22.78	0.22	0.96



### Volume and value drivers



### OLD MUTUAL ZIMBABWE

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	VOL TRADED	HIGH (YTD)	LOW (YTD)	Market Cap ZWL\$
OMZIL-ZWL\$	30.0000	-	30.0000	-	74.0000	9.0000	\$2,490,351,570.00

### Dividend Monitor

Counter	LDR	Rate	Payment Date
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### Upcoming Events

Company	Event	Venue	Time	Date
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### Cautionaries

Getbucks	29.04.19	The company is contemplating a capital raising transaction which if successful will have a material effect on the share price.
Bindura	03.09.19	The company is engaged in a transaction that may have a material effect on the price of the company's shares.
ZHL and ZPI	09.06.20	ZHL is engaged in negotiations for the acquisition of the entire issued share capital of ZPI and the transaction may result in voluntary delisting of ZPI on the ZSE if successful.
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Zimplot	11.06.20	Zimplot published cautionary statement saying it is in discussions regarding a transaction with unlisted entities in complimentary sectors to Zimplot's current product mix.
Medtech	22.09.20	This company is engaged in discussions at holding company level to transform Medtech into an investment holding company and if this transaction is concluded this might have a material impact on the price of shares.

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