



	06-Oct-14	07-Oct-14	% Δ
ZSE Industrials	192.58	190.82	0.91
ZSE Mining	89.16	89.16	0.00
Volume Traded (mn)	41.96	5.92	85.89
Value Traded (US\$ mn)	2.70	1.52	43.61
Market Cap (US\$ mn)	5,582.8	5,564.1	0.34
Foreign Purchases(US\$mn)	0.333	0.956	187.15
Foreign Sales (US\$ mn)	0.035	0.051	47.92

## ZSE slides despite improvement in activity...

The ZSE slid for the fifth successive session with the main stream industrial index shedding -0.91% to 190.82pts as market heavies continue to lose traction in the face of profit taking and heavy selling. The resources were all inactive in today's session thus the Mining Index ended flat at 89.16pts with the only change emerging to be on RIOZIM where the bid was improved to 18c tightening the quote as the stock is offered at 20c. The count of active stocks stood at twenty seven, a significant improvement on Monday's outturn of sixteen, that yielded turnover of \$1.5m for the day.

Econet and National Foods were the only gainers for the day against nine shakers in today's session. Natfoods continues to ride on the recent impressive full year performance that resulted in a spike in demand for the shares of the food processing and packaging group in recent week. In today's session Natfoods firmed +1.61% to 315c. The other gainer, telecoms group Econet, was up by a marginal +0.12% to 78.10c. Gains in both stocks could not suffice to curtail the losing streak on the ZSE as market heavies SeedCo and Delta weighed in with losses to drag the index lower. SeedCo's recent gains were brought to a crushing halt after the seed manufacturer shed a hefty -11.1% of its value to settle at 79.98c following a sudden loss of demand in the stock. Selling pressure however continued to take its toll on beverages group Delta that registered a fourth successive decline in today's session shedding -0.79% and settling at 126c while closing net sellers at that level.

Losses for the day were led by agrobased group CFI that failed to sustain its recent gains losing -16.7% to settle at 2.5c. Insurance group Nicoz Diamond were to follow after shedding -14.3% and closing the day exchanging hands at 1.2c. Meat packaging and processing company Colcom softened -10.7% on weakening demand to close at 25c while financial services group ZBFH completed the top shakers for the day after letting go of -6.25% of its value to close the day at 7.5c. OKZIM was the other notable shaker for the day as the retail giant dropped -2.78% and closed the day at 17.5c as weak demand took its toll on the group.

The total spend for the day was 43.61% lower than yesterday though prior session gains got a flattering boost from the special bargain in Zimplot, on a like for like basis value of trades was up 303%. Foreign spend anchored the turnover aggregate as inflows surged 187% to \$0.96m on yesterday. Econet commanded the largest the largest share of foreign funds which was over 70% of total spend. Outflows also went up by 48% to \$0.05m to close call with a net foreign inflow position. Foreign purchases accounted for 63% of the daily turnover up from a paltry 12% yesterday.

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

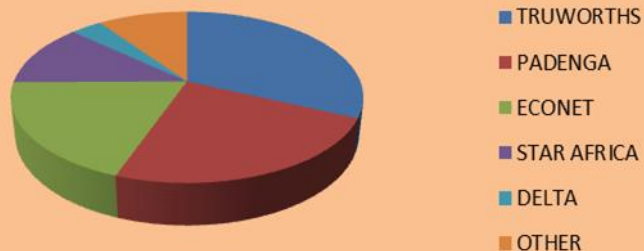
### Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	NATFOODS	315.00	1.61	57.50
2	ECONET	78.10	0.12	30.17
3				
4				
5				

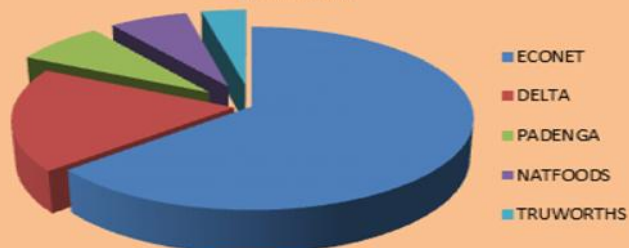
### Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	CFI	2.50	16.7	11.13
2	NICOZ	1.20	14.3	14.29
3	SEEDCO	79.98	11.1	11.13
4	COLCOM	25.00	10.7	13.64
5	ZBFH	7.50	6.25	32.43

### Volume contribution



### TURNOVER



### DIVIDEND MONITOR

Company	Dividend Type	Div Amount	Record date	Payment Date
OLD MUTUAL	Interim	2.45p	26.09.14	31.10.14
NATFOODS	Final	5.18c	26.09.14	10.10.14
INNSCOR	Final	0.7c	26.09.14	10.10.14
COLCOM	final	1.89c	26.09.14	10.10.14

### UPCOMING EVENTS

COMPANY	EVENT	VENUE	DATE
AFDIS	AGM	LOMANGUNDI ROAD, STAPLEFORD HARARE	05.11.14

### CAUTIONARIES

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

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