

## Market Comment 08.10.2015

Index	Previous	Today	Move pts	Change %
Industrial	131.50	131.18	0.32	0.24
Mining	23.57	23.57	0.00	0.00

SOURCE: ZSE

### Selected foreign play prop up activity on the ZSE...

Activity on the ZSE was confined to a selected 13 stocks generating 66 trades that were up 22% from yesterday. Today's exchanges were to a large extent concentrated in top capitalized stocks with volumes strengthening 44.30% to 10.57mn shares and values growing 53.46% to \$2.28mn with both aggregates attaining the highest level in the month of October. Leading volumes as ratios of the day's total were in ECONET (44.59%), OKZIM (41.60%), DELTA (5.32%), DAWN (2.30%) and CBZ (2.17%) whilst highest spends relative to the total were in ECONET (55.73%), DELTA (19.95%), OK (11.55%), INNSCOR (5.13%) and PPC (4.08%). Noteworthy was the dominance of foreigners with their demand side being 76.97% of the turnover and sales 92.14% of the same. The dominance of external disposals resulted in a net outflow of \$346,607. Foreign play was mostly in back to back trades in ECONET, DELTA, OKZIM and INNSCOR while their other demand was in PPC whilst additional supply was in CBZ, DAWN and SEEDCO.

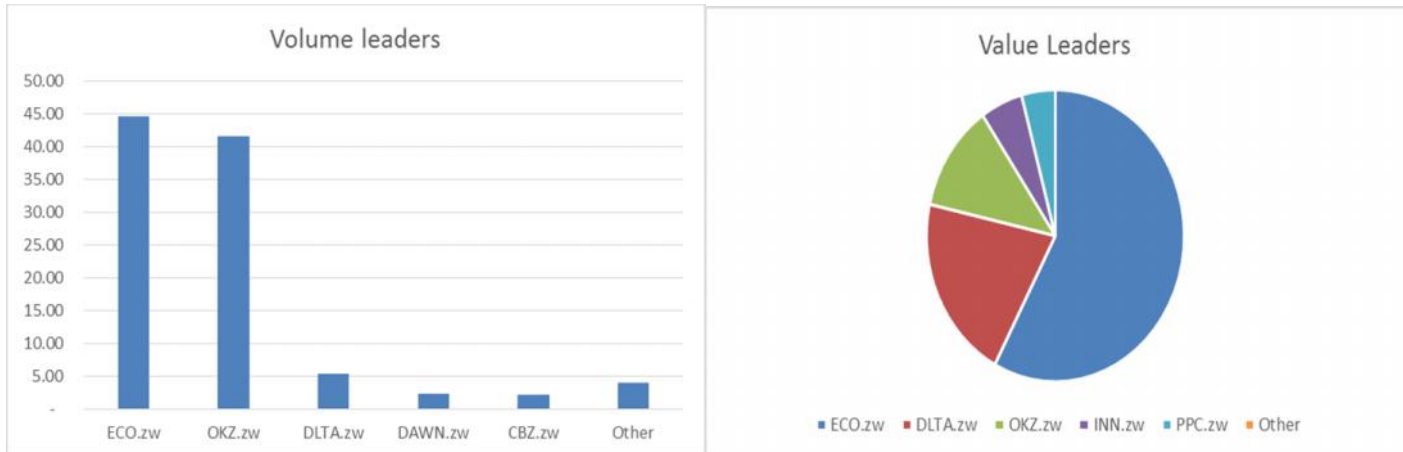
Industrials decline continued unabated with the INDEX falling 0.32pts or 0.24% to 131.18pts. Losses of the day were in INNSCOR which retreated 1.12% to \$0.6000, HIPPO that shed 1.28% to \$0.3850, TSL down 1.43% to \$0.1725 and WILLDALE that dropped 88.89% to \$0.0002. Today's most sought after stock ECONET was the sole riser adding 0.11% to \$0.2700. Its counterparties DELTA, SEEDCO and OKZIM maintained their previous respective prices of \$0.8100, \$0.9900 and \$0.0600. Minings were unchanged at 23.57pts with no single trade being recorded in the cluster.

Market Snapshot	Today	Previous	Change
Market Cap US\$	3,424,200,356	3,432,303,027	0.24
Turnover US\$	2,284,139	1,488,440	53.46
Foreign buys US\$	1,758,025	771,044	128.01
Foreign sales US\$	2,104,632	522,728	302.62
No. of trades	66	54	22.22
Volume	10,574,172	7,327,871	44.30

Gainers	Price	Change	% Change
ECO.zw	27.00	0.03	0.11

Losers	Price	Change	%Change
WILD.zw	0.02	0.16	88.89
TSL.zw	17.25	0.25	1.43
HIPO.zw	38.50	0.50	1.28
INN.zw	60.00	0.68	1.12

### Volume and value drivers



### Dividend Monitor

<u>Counter</u>	<u>LDR</u>	<u>Rate</u>	<u>Payment Date</u>
NFOOD	09.10.15	4.65c	10.11.15
COLCOM	09.10.15	1.8c	10.11.15
INNSCOR	09.10.15	0.55c	10.11.15

### Upcoming Events

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Time</u>	<u>Date</u>
FIDELITY	EGM	7th Floor Fidelity House	10.00AM	20.10.15
CFI	EGM	Royal Harare Golf Club, Harare	10.00AM	16.10.15
AFDIS	AGM	St Mannock's Lomagundi Harare	11.00AM	04.11.15