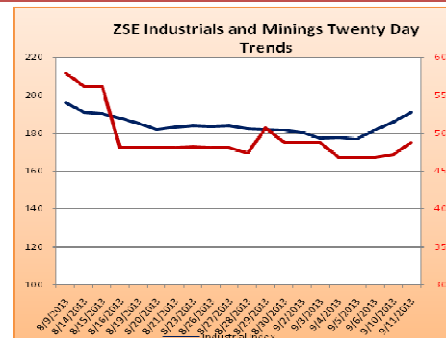
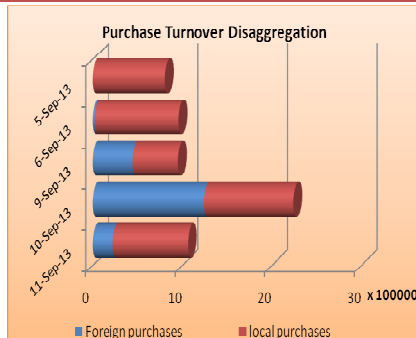
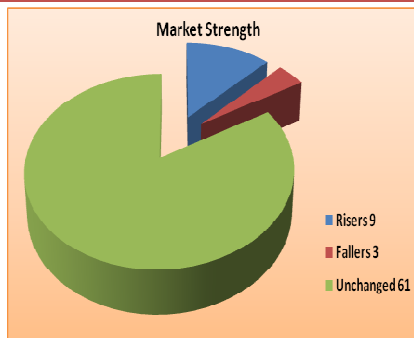




Daily ZSE market Report

11-Sept -2013



	10-Aug-13	11-Sept-13	% Δ
ZSE Industrials	185.89	191.14	2.82
ZFN top ten	147.78	147.78	0.00
ZFN Banking index	80.72	80.72	0.00
ZSE Mining	47.17	48.73	3.31
Volume Traded (m)	5.90	6.12	3.64
Value Traded (US\$m)	2.24	1.06	52.55
Market Cap (US\$m)	5,064.19	5,070.17	0.12
Foreign Purchases (US\$m)	1.245	0.227	81.79
Foreign Sales (US\$m)	1.076	0.698	35.14
Number of Trades	54	60	11.11

Market further strengthens on cabinet announcement...

The market cheered yesterday's long awaited cabinet announcement as the industrials surged +2.82% to 191.14 pts and minings advanced +3.31% to 48.73pts. Driving the former was Delta's +5.8% rise to 127c on \$0.44m worth of trades and closing with 120-130c spread. Econet firmed +6.8% to end at 55c while retailers OK surged +4.8% to 23.10c, both gaining on the back of paltry trades and ending net buyers.

Short-term insurer Nicoz Diamond which reported an interim gross premium written growth of +13.8% to \$16m was the day's leading riser jumping +25% to 2c, the company's focus in H2 is on cost containment and cash generation to full year. Trailing was Dawn which notched +11.1% to 1c amid market news that its parent African Sun is contemplating selling its stake in the company to a friendly investor and use proceeds to expunge its debts. Penny stock Pelhams also made a surprise +11.1% rise to 0.01c.

Today's losers were minimized at 4. Selling pressure weighed on global financial giant Old Mutual which retreated -2.8% to 225c in contrast to firming London and Johannesburg Stock Exchange prices. Crocodile skin producers Padenga still to release its June year ended finals weakened -1.8% to 5.01c while Mash declined -12.3% to its support price of 3c. Medtech which last reported a likely profitable F2013 was the major faller dropping -14.3% to 0.06c on \$27 worth of trades

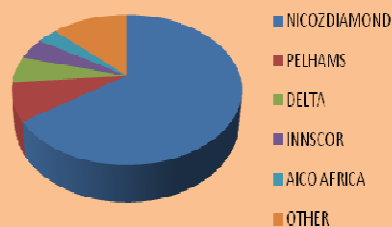
Top Risers

	Stock Name	Price	% Δ	YTD Δ %
1	NICOZ	2.00	25.00	42.86
2	PELHAMS	0.10	11.11	50.00
3	DAWN	1.00	11.11	42.86
4	ECONET	55.00	9.98	22.22
5	DELTA	127.00	5.82	27.00

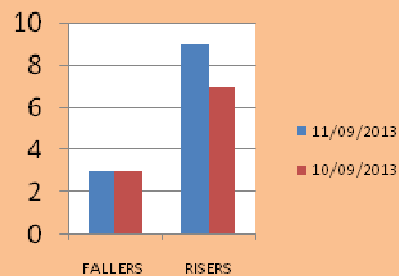
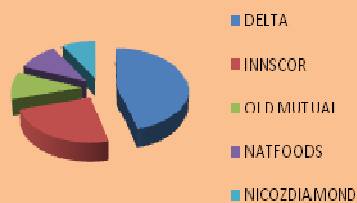
Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	MEDTECH	0.06	14.29	100.00
2	OLDMUTUAL	225.00	2.17	48.03
3	PADENGA	5.01	1.76	11.33
4				
5				

Volume contribution



TURNOVER



Dividend Monitor

<u>Company</u>	<u>Dividend Type</u>	<u>Div Amount</u>	<u>Record date</u>	<u>Payment Date</u>
Old Mutual	interim	2.1GBp	27.09.13	31.10.13
ABC	interim	14 thebe	30.08.13	13.09.13
FBC	interim	0.149USc	06.09.13	24.09.13
CBZ	interim	0.1673USc	06.09.13	17.09.13
INNASCOR	Final	1c	20.09.13	04.10.13
NATFOODS	Final	3c	20.09.13	04.10.13

UPCOMING EVENTS

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Date & Time</u>
NTS	AGM	NTS Head office Seke Road	TBA
Econet	AGM	Econet Park	17 Sept 1000 HRS
Dawn	AGM	Ophir Room , Crowne Plaza	25 Sept 1000 HRS
Pearl	ANALYSTS BRIEF	Royal Harare Golf Club	09Sept 1200 HRS
FML	ANALYSTS BRIEF	Royal Harare Golf Club	09Sept 1400 HRS

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