

### RESEARCH - MARKET COMMENT

## Market Comment 13.11.2020

Index	Previous	Today	Move pts	Change %
Industrial	5,162.47	5,151.10	11.37	0.22
Mining	3,430.75	3,430.75	0.00	0.00
ZSE 10	1,017.72	1,012.72	5.00	0.49
ZSE ALL SHARE	1,563.02	1,559.67	3.35	0.21

**SOURCE: ZSE** 

# ZSE falters in week-ending session...

The ZSE faltered in Friday's session, reversing three consecutive sessions of gains. The mainstream All share Index eased 0.21% to 1,559.67pts while, the Industrials slipped 0.22% to 5,151.10pts. The blue chips Index shed 0.49% to close at 1,012.72pts. Medtech led the fallers of the day on a 6.25% slide to \$0.0750 while, Innscor followed trimming 3.02% to \$25.1948 as crocodile skin producers Padenga retreated 1.86% to \$13.7400. Zimplow went down 1.39% to \$4.9304 as ART completed the top five shakers of the day on a 1.31% loss to end pegged at \$2.2600. Apparel retailer Truworths topped the gainers' list on a 20% surge to \$0.1740, trailed by packaging group Nampak that advanced 6.25% to \$0.8500. Edgars put on 5.27% to \$1.0000 while, hotelier African Sun improved 4.39% to \$1.8500. General Beltings capped the top five winners of the day with a 4.04% gain to \$0.1700.

Gainers outnumbered fallers by a count of three leaving the market with a positive breadth. Activity aggregates weakened in the session as volumes declined 0.54% to 22.04m shares while, turnover dropped 28.50% to \$50.62m. Top volume drivers of the day were First Capital (45.14%), Turnall (23.59%) and Econet (14.82%). Driving today's turnover were Econet, FBC, Delta and First Capital which claimed a combined 67.15% of the aggregate. Foreign purchases dipped 38.38% to \$9.22m while, sales succumbed 27.22% to \$26.33m as the market closed with a net outflow position.

Market Snapshot	Today	Previous	%Change
Market Cap ZWL \$	188,025,601,474	188,411,367,067	0.20
Turnover ZWL \$	50,616,415.69	70,796,871.75	28.50
Foreign buys ZWL \$	9,216,963.60	14,956,607.45	38.38
Foreign sales ZWL \$	26,334,815.00	36,185,755.55	27.22
No. of trades	236	274	13.87
Volume	22,040,029	22,160,262	0.54
Today's Gainers	Price	Change	% Change
Truworths Limited	17.40	2.90	20.00
Nampak Zimbabwe Limited	85.00	5.00	6.25
Edgars Stores Limited	100.00	5.01	5.27
African Sun Limited	185.00	7.78	4.39
General Beltings Holdings Limited	17.00	0.66	4.04
Today's Losers	Price	Change	% Change
Medtech Holdings Limited	7.50	0.50	6.25
Innscor Africa Limited	2,519.48	78.51	3.02
Padenga Holdings Limited	1,374.00	26.00	1.86
Zimplow Holdings Limited	493.04	6.96	1.39
Amalgamated Regional Trading (Art) Holdings Limited	226.00	3.00	1.31

Time

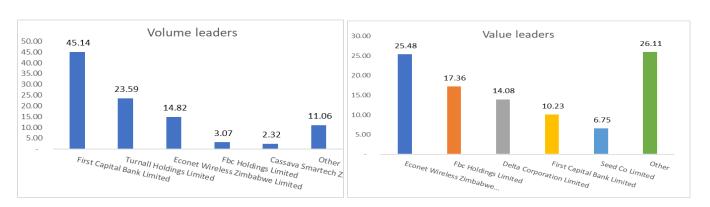
**Date** 



Members of the Zimbabwe Stock Exchange

13.11.2020

### Volume and value drivers



#### **OLD MUTUAL ZIMBABWE**

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	VOL TRADED	HIGH (YTD)	LOW (YTD)	Market Cap ZWL\$
OMZIL- ZWL\$	35.5000	-	35.5000	-	74.0000	9.0000	\$2,946,916,024.50

#### **Dividend Monitor**

<u>Counter</u>	<u>LDR</u>	<u>Rate</u>	Payment Date
Delta	27.11.2020	\$0.4500	17.12.2020

Venue

**Event** 

## **Upcoming Events**

Company

Company			<u>venue</u>	<u></u>	<u> </u>
AFDIS		AGM	Virtual	1220hrs	13.11.2020
Innscor		AGM	Royal Harare Golf Club	0815hrs	01.12.2020
Meikles		AGM	Virtual	0900hrs	03.12.2020
Cautionar	ies				
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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Zimplow	11.06.20	Zimplow published cautionary statement saying it is in discussions regarding a transaction with unlisted entities in complimentary sectors to Zimplow's current product mix.			
Medtech	22.09.20	There 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.			
SeedCo Ltd	27.10.20		es further cautionary announcement saying negot s operations under SeedCo International.	iations are ongoing regard	ding the proposal to

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