



	18-Jun-15	19-Jun-15	% Δ
ZSE Industrials	152.94	152.90	0.03
ZSE Mining	40.40	40.28	0.30
Volume Traded (mn)	2.21	2.66	20.42
Value Traded (US\$ mn)	0.32	0.21	34.90
Market Cap (US\$ mn)	4,237.83	4,242.06	0.10
Foreign Purchases (US\$ mn)	0.122	0.074	39.20
Foreign Sales (US\$ mn)	0.000	0.037	0.00

## ZSE slows in week ending session...

It was a quiet Friday session with turnover dropping 34.90% \$0.21mn on subdued activity and dominance of low value stocks. The major contributions to the value traded were in ECONET - \$0.081mn (42.3%), BAT - \$0.058mn (29.9%) and SEEDCO - \$0.01mn (6.7%). No trades were witnessed in DELTA that was sellers only at 105c, INNSCOR exchanged a mere 700 shares at 67.99c while OLD MUTUAL held at 267c. Contrastingly, volumes traded were up 20.42% to 2.66mn with outstanding volumes in penny stocks with 1mn coming from ZIMPAPERS and 0.64mn from ART. Foreign demand fell 39.20% to \$0.074mn and was seen in ECONET and SEEDCO. The \$0.037mn foreign sales were singularly confined to ECONET.

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

### Top Risers

	Stock Name	Price	% Change	YTD Δ %
1	ZBFH	3.50	40.00	2.78
2	ARISTON	0.50	25.00	16.67
3	FIDELITY	7.00	7.69	6.67
4	DAWN	1.60	3.23	52.38
5	BAT	1150.00	0.88	2.68

### Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	ZIMPAPERS	0.60	20.00	14.29
2	LAFARGE	38.00	5.00	30.91
3	HWANGE	3.90	2.50	18.75
4	SEEDCO	95.00	-2.06	2.06
5	ECONET	43.00	0.12	28.33

The market recorded zero breath today with 5 stocks rising, 5 falling and 15 unchanged. The Industrial Index's weakness persisted with it easing 0.04pts or 0.03% to settle at 152.90pts. Today's industrials loss was attributable to ECONET that shed 0.12% to 43c, SEEDCO that gave up 2.06% to demanded price of 95c, LAFARGE that fell 5% to 38c on a paltry \$145.54 worth of trade and penny stock ZIMPAPERS that dropped 20% to 0.6c. Mitigating the market decline was BAT's 0.88% uplift to 1,150c accompanied by small cap gains in DAWN that sustained its uptrend notching 3.23% to 1.60c. Further gains were in FIDELITY that jumped 7.69% to 7c, ARISTON that rallied 25% to 0.50c and ZBFH that heaved 40% to 3.50c.

The resources index declined 0.12pts or 0.30% to end the week at 40.28pts on HWANGE's 2.50% retreat to 3.90c that helped break previous two days' stagnation. The other trade in the cluster was in BINDURA that held at 3.21c and exhibited weakness as immediate demand was filled. Meanwhile coal miners HWANGE was reported to be commissioning its \$31.2mn equipment today that will see it increasing its monthly minimum output to 450,000 tonnes, while the company is expecting not less than \$18mn turnover in the second half of the year following this investment.



## DIVIDEND MONITOR

COMPANY	DIV TYPE	DIV AMOUNT	RECORD DATE	PAYMENT DATE
PEARL	Final	0.555c	05.06.15	24.06.15
ECONET	Final	0.31c	17.07.15	24.07.15
SEEDCO	Final	1c	26.06.15	29.07.15

## UPCOMING EVENTS

COMPANY	EVENT	VENUE	DATE	TIME
ZPI	AGM	206 S. Machel Avenue, Harare	23.06.15	1200hrs
POWERSPEED	Analyst briefing	Cnr Cripps/Kelvin Rd North ,Harare	24.06.15	1030hrs
GENERAL BELTINGS	AGM	111 Danham Road, Willowvale ,Harare	24.06.15	1130hrs
FBC	AGM	Harare Royal Golf Club, Harare	25.06.15	1200hrs
UNIFREIGHT	AGM	Cnr Hood/Hemes Rd ,Southerton,Harare	30.06.15	1000hrs
HWANGE	AGM	7 <sup>TH</sup> Floor, Coal House, N Mandela Ave, Harare	30.06.15	1030hrs
ZIMPAPERS	AGM	6 <sup>TH</sup> Floor ,Herald House, Boardroom, Harare	30.06.15	1200hrs
MEDTECH	AGM	Stand 619 ,Cnr Shumba/Hacha Rd ,Ruwa	30.06.15	1500hrs

## CAUTIONARIES

COMPANY	ISSUE DATE	SUBJECT
RIOZIM	Mar-15	Capital raise- rights issue
DAWN	Apr-15	Compiling offer to minorities as major shareholders now control 61% of shares
STAR AFRICA	Apr-15	Negotiations underway that may have a material impact on its share value
INNSCOR	June-15	Approved the unbundling of the Company's Quick Service Restaurant
NICOZ	June-15	Discussions underway that may have a material impact on its share value

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