



EFE RESEARCH – MARKET COMMENT

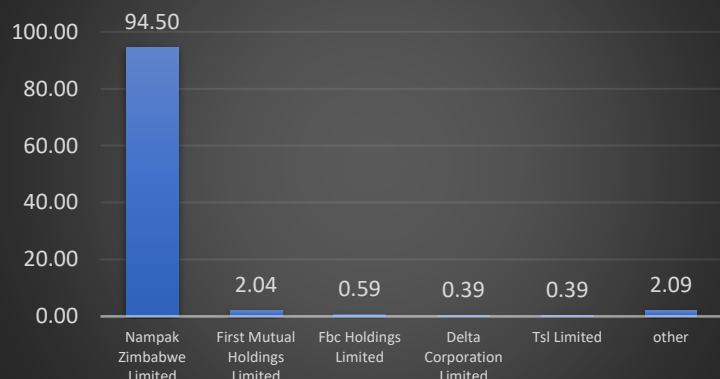
19.06.2023

TODAY'S GAINERS	PRICE(ZWL\$)	% CHANGE
Cfi Holdings Limited	2562.8000	15.00
Fbc Holdings Limited	716.9000	15.00
Cafca Limited	577.9000	14.99
National Tyre Services Limited	18.5000	14.91
Zimre Holdings Limited	63.0000	14.55

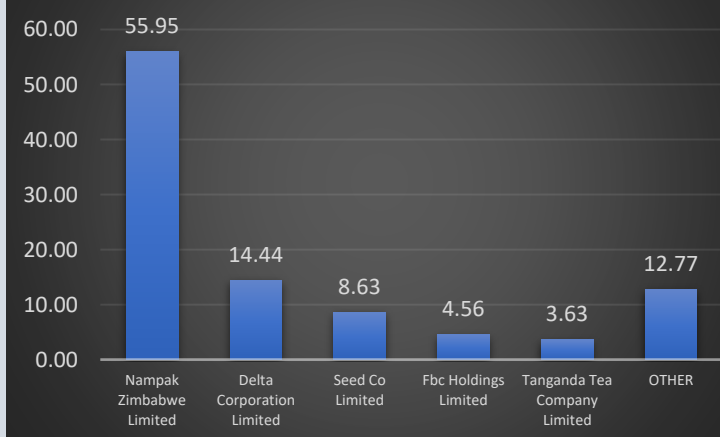
TODAY'S LOSERS	PRICE(ZWL\$)	% CHANGE
Delta Corporation Limited	3443.8289	10.07
Starfricacorporation Limited	5.3498	8.79
Tsl Limited	750.0000	6.25
Ecocash Holdings Zimbabwe Limited	175.5872	6.05
Econet Wireless Zimbabwe Limited	1013.4335	3.28

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap ZWL \$	13,788,571,739,801	3.23
Turnover ZWL \$	1,377,894,965.90	54.56
Foreign buys ZWL \$	362,035,500.00	105.44
Foreign sales ZWL \$	-	100.00
Volume	14,813,677	1114.53

VOLUME LEADERS



VALUE LEADERS



INDEX	TODAY (PTS)	CHANGE %
ZSE ALL SHARE	180,652.18	3.02
ZSE 10	107,188.13	4.64
ZSE-Agriculture	704.65	0.95
Mid-Cap	366,029.58	2.29

Nampak highlights the session...

Packaging group Nampak highlighted the volume and value aggregates as 13.99m shares worth \$769.87m exchanged hands. The trade accounted for 94.50% of total volumes and 55.95% of the turnover. The other notable value driver was Delta that claimed 14.44% of the outturn. Volume of shares traded in the session ballooned 1114.53% to 14.81m while, value outturn jumped 54.56% to \$1.38bn. Delta was the top faller of the day on a 10.07% tumble to \$3443.8289 followed by Star Africa that dipped 8.79% to \$5.3498. TSL shed 6.25% to end pegged at \$750.0000 as Ecocash trimmed 6.05% to \$175.5872. Telecoms giant Econet capped the top five shakers of the day on a 3.28% decline to \$1,013.4335. Partially mitigating today's losses were gains in CFI that jumped 15.00% to \$2,562.8000 and banking group FBC that put on a similar 15.00% to trade at \$716.9000. Cable manufacturer CAFCA charged 14.99% to \$577.9000 as NTS soared 14.91% to \$18.5000. Zimre Holdings capped the top five winners' pack on a 14.55% jump to \$63.0000.

The market retreated further in new week as the primary All Share Index succumbed 3.02% to 180,652.18pts while, the Blue Chips Index trimmed 4.64% to 107,188.13pts. The ZSE Agriculture Index added 0.95% to 704.65pts while, the Mid Cap Index rose 2.29% to 366,029.58pts. Cumulatively, 665,470 units worth \$32.78m exchanged hands in four ETFs. The Cass Saddle ETF edged up 14.40% to \$4.8327 while, the Datvest ETF improved 6.04% to \$14.9355. The Old Mutual ETF gained 0.27% to \$52.7494 while, the Morgan and Co MCS was stable at \$145.0000. The Tigere REIT climbed 9.27% to \$330.0000 on 507 units.



TODAY'S GAINERS	PRICE(USD\$)	% CHANGE

TODAY'S LOSERS	PRICE(USD\$)	% CHANGE
African Sun Limited	0.0659	5.86
Simbisa Brands Limited	0.3978	0.52
Axia Corporation Limited	0.0900	0.11

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap USD \$	1,366,175,264.86	0.82
Turnover USD \$	21,135.40	146.85
Volume	57,500	53.15

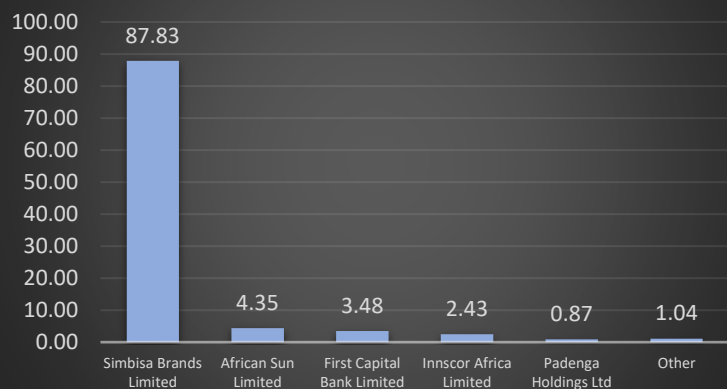
INDEX	TODAY (PTS)	CHANGE %
VFEX ALL SHARE	78.67	0.84

VFEX All Share falls marginally ...

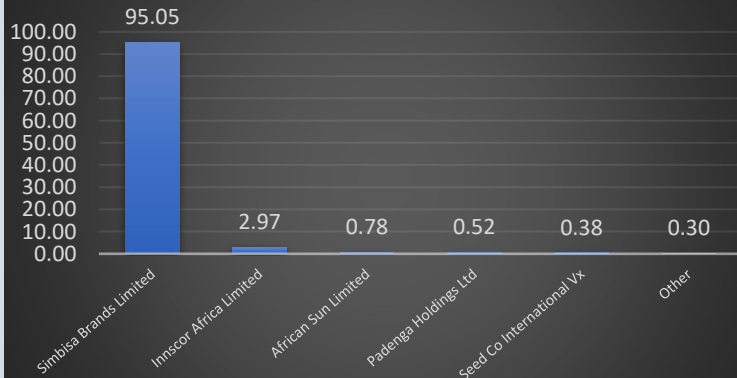
The VFEX All Share Index dropped 0.84% to 78.67pts. African Sun led the decliners of the day on a 5.86% retreat to \$0.0659 as Simbisa let go 0.52% to \$0.3978. Axia gave up 0.11% to USD\$0.0900. There were no gainers on the VFEX in Monday's trades .

Turnover swelled 146.85% to USD\$21,135.40 as volumes traded slipped 53.15% to 57,500 shares. Simbisa anchored the volume and value aggregates claiming 87.83% of the former and 95.05% of the latter.

VOLUME LEADERS



VALUE LEADERS





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OMZIL Price

Price (VWAP)	Last Price	% Change	Traded Volume	Turnover
\$1,092.00	\$1,092.00	-	136.00	\$175,165.60

Dividend Monitor

COUNTER	EX-DIV	RATE	PAYMENT DATE
DELTA	31.05.2023	USD\$0.03 cents	21.06.2023

Upcoming Events

COMPANY	EVENT	VENUE	TIME	DATE
First Mutual Properties	AGM	First Mutual Office Park, 100 Borrowdale	09.30hrs	27.06.2023
Bridgefort Capital	AGM	Virtual	11.00hrs	27.06.2023
Fidelity	AGM	Virtual	10.00hrs	28.06.2023
General Beltings	AGM	111 Dagenham Road, Willowvale, Harare	11.30hrs	28.06.2023
AFSUN	AGM	Virtual	0900hrs	28.06.2023
Turnall	AGM	Virtual	0900hrs	29.06.2023
Zimpapers	AGM	Virtual	11.00hrs	29.06.2023

Cautionaries

FSL	01.02.2022	The company has entered negotiations for a potential acquisition transaction in a complementary business which, if successfully concluded may have a material affect the share price.
FML	07.04.2022	The company advises stakeholders that IPEC intends to perform a forensic investigation on First Mutual Life Assurance a subsidiary of First Mutual Holdings arising from the asset separation exercise initiated by IPEC. The developments may have a material impact on share price.
GBH	18.05.2022	The company advice stakeholders that its major shareholder wishes to consummate an offer to minority shareholders.
CBZ	27.09.2022	Further to the cautionary statements issued on 18 June 2022, 21 July 2022 and 29 August 2022, the directors wish to advise all shareholders that the Company is still engaged in negotiations for a potential acquisition of a complimentary business which if successful may have a material effect on the price of the company's shares.
ZB FINANCIAL	20.06.2022	The company advice shareholders that one of the company's shareholders is engaged in negotiations for a potential acquisition of a control block of securities which if concluded may have a material effect on the share price.
OK Zimbabwe	05.08.2022	Shareholders are advised that the Company is engaged in discussions that involve a potential transaction that may have a material effect on the price of the company's shares. The transaction involves the restructuring of the company and its unbundling into a group of companies.
WILLDALE	21.09.2022	Further to a cautionary statement published on 3 August 2022 shareholders are advised that negotiations for the disposal of certain idle assets whose outcome could have a material effect on the business and share price, are still in progress.
STAR AFRICA CORPORATION	15.02.2023	The company released a cautionary that discussions are going on with its supplier of raw sugar following a price increase and untenable trading conditions. Therefore, shareholders are advised to exercise caution when dealing in the company shares.
TURNAL Holdings		
Padenga Holdings	16.06.2023	The company released a cautionary advising shareholders and the investing public that it is considering the re-organization of the Affairs of Padenga to rationalize its shareholding structure and operations.



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