



	22-Jun-15	23-Jun-15	% Δ
ZSE Industrials	151.85	150.55	0.86
ZSE Mining	40.28	40.28	0.00
Volume Traded (mn)	0.65	5.91	804.68
Value Traded (US\$ mn)	0.19	0.95	394.75
Market Cap (US\$ mn)	4,241.62	4,219.89	0.51
Foreign Purchases (US\$ mn)	0.042	0.585	1293.70
Foreign Sales (US\$ mn)	0.001	0.000	-

Persistent bearish sentiment drives market lower...

Bearish sentiment prevailed in Tuesday's trades to weigh negatively on the Industrial Index. Losses in five counters outweighed the two risers for the day to leave the industrials down 0.86% at 150.55pts. The shakers of the day were dominated by market heavies, amongst them Delta, Econet and SeedCo. Delta succumbed to selling pressure shedding 2.86% to settle at 102c though demand remained subdued even at that level. Similar weakness was also prevalent on Econet trades as the telecoms group let go a marginal 0.02% and had its shares exchanging hands at 41.99c. The other heavy cap shaker, SeedCO retreated 0.01% and closed at 95c. However, NTS led the shakers of the day on a 20% retreat to 2c with retail group OKZIM following on a decline of 11.1% to 8c.

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

Top Risers

	Stock Name	Price	% Change	YTD Δ %
1	OLDMUTUAL	267.50	0.19	14.32
2	MEIKLES	7.01	0.14	51.66
3				
4				
5				

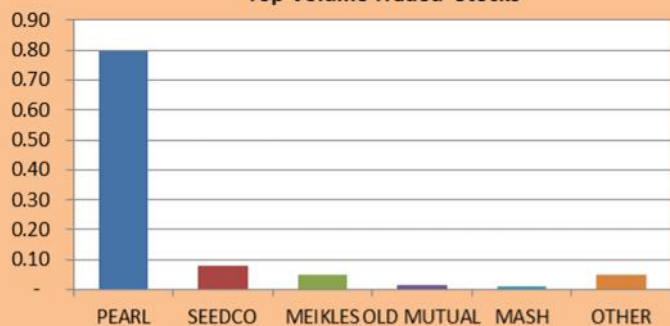
Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	NTS	2.00	20.00	20.00
2	OK	8.00	11.11	30.43
3	DELTA	102.00	2.86	0.00
4	ECONET	41.99	-0.02	30.02
5	SEEDCO	95.00	0.01	2.06

Countering the loses were gains in Old Mutual and Meikles that saw marginal improvements in today's call. Strong demand in Old Mutual pushed the global financial services group up 0.19% and closed at 267.50c as it went out net buyers at that level. Meikles added 0.14% and closed at 7.01c; again with outstanding demand showing in the diversified group. Meanwhile, the Mining Index held at its previous level of 40.28pts for the third session in a row as there was no activity in the constituent stocks of the cluster. All quotes on the mining stocks remained unchanged except for Falgold which had its offer lowered further to 1c with no demand showing in the gold miners.

It was a much improved trading session relative to yesterday, activity wise, with the value of trades ballooning 395%, though it remained below the psychological \$1.00m market daily average at \$0.95m. SeedCo was the most liquid stock on the market after \$0.45m or 47.8% of the day's aggregate value was spurned in the name. Other notable trades were in Old Mutual \$0.25m and Pearl \$0.13m. Volumes of the day surged 804% to 5.91m shares with the top contribution exchanging hands in Pearl were 4.7m shares, representing 79% of the total shares to trade in today's call.

Top Volume Traded Stocks



Top Value Traded Stocks



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 TH Floor, Coal House, N Mandela Ave, Harare	30.06.15	1030hrs
ZIMPAPERS	AGM	6 TH 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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