



Index	Previous	Today	Move pts	Change %
Industrial	35,637.61	35,089.36	548.26	1.54
Mining	6,409.34	6,539.94	130.59	2.04
ZSE 10	6,702.24	6,559.88	142.37	2.12
ZSE ALL SHARE	10,765.64	10,603.20	162.45	1.51

SOURCE: ZSE

ZSE retreats ahead of the budget...

The ZSE continued to trend southwards ahead of the budget presentation by the Minister of Finance this afternoon. The primary All-Share Index slipped 1.51% to close at 10603.20pts while, the Industrial Index went down 1.54% to 35089.36pts. The Top Ten Index lost a further 2.12% to 6559.88pts as the Mining Index maintained gains from the previous session on a 2.04% rise to 6539.094pts. Topping the gainers' pack was Medtech Holdings Class B which registered its first trade at \$18.0000, followed by Medtech Holdings Class A that rose 14.10% to \$50.6000. First Mutual Properties advanced 6.67% to \$8.5333 while, ART Holdings added 5.26% to \$11.0000. Sugar refinery Star Africa completed the top five winners' set with a 4.87% rise to \$1.2766. The day's losers were headlined by conglomerate Meikles which dropped 17.14% to \$145.0000, trailed by related group African Sun that shed 8.63% to close at \$7.0453. Mashonaland Holdings was 6.84% lower at \$4.1920 as fast foods retailer Simbisa Brands trimmed 5.41% to \$80.1859. Capping the top five decliners of the day was Econet spin-off Cassava Smarttech which eased 4.58% to finish at \$42.7415.

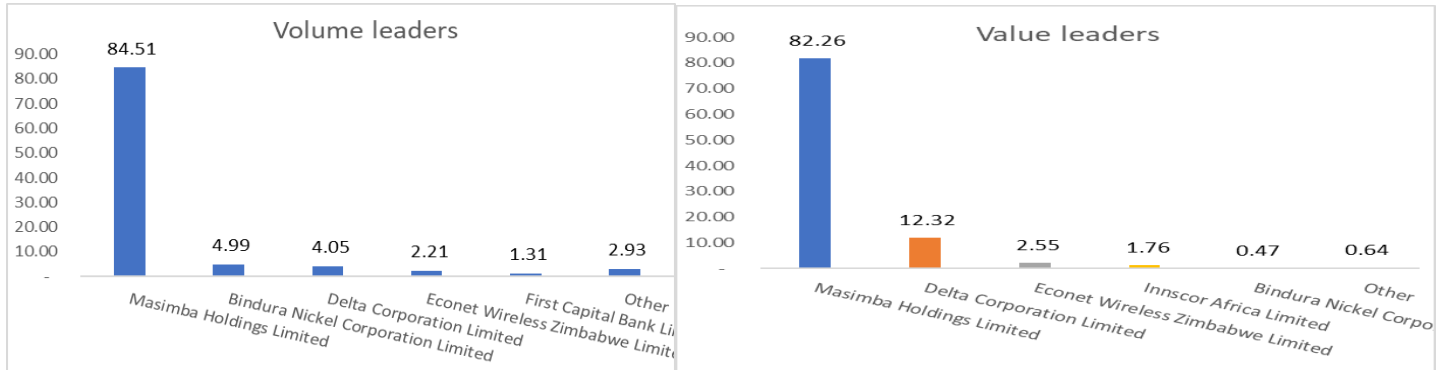
The market closed with a negative breadth of one as fourteen counters advanced while, fifteen faltered. Activity aggregates were mixed as witnessed in turnover that ballooned 109.21% to \$501.2m while, volume of shares exchanged retreated 34.14% to 10.2m. Masimba was the top volume and value driver of the day as it claimed 84.51% of the former and 82.26% of the latter. Delta was the other notable value driver on a 12.32% contribution. The Old Mutual ETF eased 2.08% to end at \$5.2698 as 10,739 units worth \$56,292.20 swapped hands. The VFEX registered no trades for the day. Foreign purchases dipped 67.43% to \$79,305.00 as sales plummeted 71.80% to \$3,592,000.00 to register a net funds outflow position.

Market Snapshot	Today	Previous	Change
Market Cap ZWL \$	1,209,506,191,290	1,228,283,801,541	1.53
Turnover ZWL \$	501,225,238.54	239,575,553.03	109.21
Foreign buys ZWL \$	79,305.00	243,500.00	67.43
Foreign sales ZWL \$	3,592,000.00	12,735,850.00	71.80
No. of trades	386	322	19.88
Volume	10,161,991	15,429,819	34.14

Today's Gainers	Price	Change	% Change
Medtech Holdings Limited Class B	18.0000	18.00	17999900.00
Medtech Holdings Limited	50.6000	6.25	14.10
First Mutual Properties Limited	8.5333	0.53	6.67
Amalgamated Regional Trading (Art) Holdings Limited	11.0000	0.55	5.26
Starafriacorporation Limited	1.2766	0.06	4.87

Today's Losers	Price	Change	% Change
Meikles Limited	145.0000	30.00	17.14
African Sun Limited	7.0453	0.64	8.36
Mashonaland Holdings Limited	4.1920	0.31	6.84
Simbisa Brands Limited	80.1859	4.59	5.41
Cassava Smarttech Zimbabwe Limited	42.7415	2.05	4.58

Volume and value drivers



VICTORIA FALLS STOCK EXCHANGE (USD)

COUNTER	PRICE (USD\$)	%CHANGE	LTP	HIGH	LOW	VOL TRADED	VALUE TRADED (USD)
PADENGA	-	-	0.1950	0.3600	0.1800	-	-
SEEDCO INTERNATIONAL	-	-	0.2800	0.2809	0.1800	-	-
Total						-	-

Old Mutual Zimbabwe

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	VOL TRADED	HIGH (YTD)	LOW (YTD)	Market Cap ZWL\$
OMZIL-ZWL\$	71.0000	0	71.0000	18,000	84.0000	26.5000	\$5,893,832,049.0000

Old Mutual ZSE Top 10 ETF

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	LOW(YTD)	HIGH (YTD)	TOTAL VOLUME TRADED	TOTAL VALUE TRADED -ZWL
OMTT-ZWL\$	5.2698	-2.08	5.2500	1.0000	6.0000	10,739	56,292.2000

Dividend Monitor

Counter	LDR	Rate	Payment Date
DELTA	03.12.2021	\$0.7500	15.12.2021
AFDIS	03.12.2021	\$0.7000	28.12.2021
Unifreight	03.12.2021	\$0.4226	10.12.2021
CBZ	03.12.2021	\$0.9578	10.12.2021

Upcoming Events

Company	Event	Venue	Time	Date
MEIKLES HOLDINGS	A.G.M	VIRTUAL	09.00hrs	01.12.2021
Ministry of Finance	National Budget	-	-	25.11.2021
CALEDONIA	Listing on VFEX	-	-	01.12.2021
TANGANDA LIMITED	Listing on ZSE	-	-	09.12.2021
Bindura	Delisting on ZSE	-	-	15.12.2021
Bindura	Listing on VFEX	-	-	17.12.2021

Cautionaries

Meikles	15.04.21	Company published cautionary statement on the unbundling and separate listing of Tanganda Tea Company Limited
ZIMFLOW HOLDINGS	21.09.2021	The company is negotiating a transaction which if successfully completed may have material impact on the value of the company shares.
STAR AFRICA	18.10.2021	The major shareholder is contemplating a transaction that may have a material impact on the value of the company's shares.
BINDURA NICKEL	18.10.2021	The company is engaged in discussions that involve a potential corporate action which if successfully completed may have material impact on the price of the company shares.
FIRST MUTUAL	12.11.2021	Major shareholder NSSA has executed an agreement selling 31.22% of its stake to CBZ Holdings.
CBZ	12.11.2021	NSSA has executed an agreement selling 31.22% of its in FML to CBZ Holdings.

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