



	25-Jun-15	26-Jun-15	% Δ
ZSE Industrials	148.60	148.79	0.13
ZSE Mining	40.19	40.19	0.00
Volume Traded (mn)	0.65	3.53	443.00
Value Traded (US\$ mn)	0.08	0.48	543.23
Market Cap (US\$ mn)	4,157.20	4,102.86	1.31
Foreign Purchases (US\$ mn)	0.028	0.277	884.88
Foreign Sales (US\$ mn)	0.000	0.224	

ZSE halts eight session losing streak...

The ZSE halted an eight session losing streak with a marginal 0.13% rebound for the main stream Industrial Index to 148.79pts. Subdued demand and sell offs reminiscent of profit taking in most momentum stocks took their toll on the bourse resulting in the index touching a thirty six months low of 148.6pts. Of the twelve stocks to trade, four saw price movements and these were distributed as two risers and two fallers. The bulls of the day, Old Mutual and Hippo, swung the tide for the market as it closed in the black. Hippo powered to a leading 8.57% gain to 38c on active bidding, while exchanging 137,105 shares. Old Mutual extended its uptick with a 0.33% surge to 270c as pressure from the swelling demand remains sustained.

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

Top Risers

	Stock Name	Price	% Change	YTD Δ %
1	HIPPO	38.00	8.57	30.91
2	OLDMUTUAL	270.00	0.33	15.38
3				
4				
5				

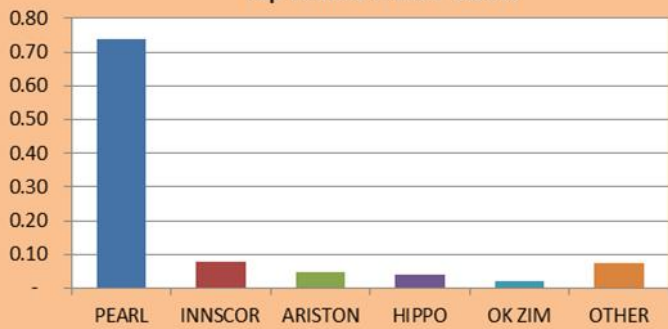
Top Fallers

	Stock Name	Price	% Δ	YTD Δ %
1	DAWN	1.50	6.25	42.86
2	DAIRIBORD	7.50	3.85	6.25
3				
4				
5				

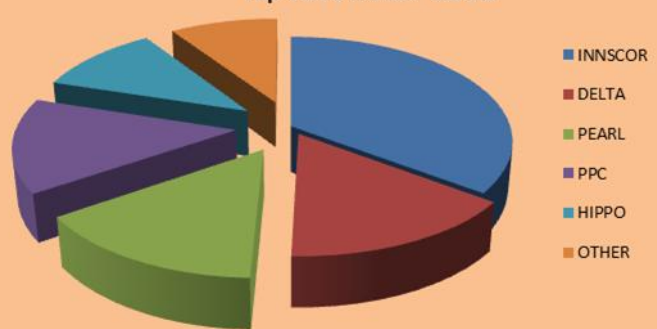
Dawn Properties and Dairibord constituted the bears of the day with the property group shedding 6.25% to 1.5c, as it led the declines of the day. Dairibord took a 3.85% dip to 7.5c on a scrappy trade of 862 shares worth \$64. Elsewhere, it was another quiet session for the minings resulting in the Mining Index holding flat at 40.19pts with all stocks in this cluster registering no trades and all the quotes remaining unchanged.

Most of the day's activity aggregates showed an improvement on yesterday, though these remained way below the long run daily averages. Value of shares exchanged in today's session improved 543% on yesterday to \$0.48m, though this falls short of the psychological daily market average of \$1m. Innscor drove the values of the day after contributing 35.2% to the aggregate, while other notable trades were seen in Delta 15.3%, Pearl 14.9% and PPC 14.5%. Volumes of the day were up 443% on yesterday to 3.53m shares anchored by property group Pearl that saw 2.6m shares exchange hands at a stable price of 2.8c. A resurgence in foreign participation also spurred activity in today's call with inflows improving to \$0.28m, while outflows accounted for \$0.22m as the market established a net funds outflow position of \$0.053m.

Top Volume Traded Stocks



Top Value Traded Stocks



DIVIDEND MONITOR

COMPANY	DIV TYPE	DIV AMOUNT	RECORD DATE	PAYMENT DATE
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
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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