



Index	Previous	Today	Move pts	Change %
Industrial	805.87	801.02	4.85	0.60
Mining	338.71	338.71	0.00	0.00
ZSE 10	218.11	216.42	1.69	0.77
ZSE ALL SHARE	242.07	240.63	1.44	0.59

SOURCE: ZSE

## ZSE slips into the red...

The market slipped into the red in the penultimate session of the month of November, leaving three of the benchmark indices closing pointing southwards. The mainstream All Share Index let go 0.59% to 240.63pts while, the Industrials tumbled 0.60% to 801.02pts. The ZSE Top Ten Index tripped 0.77% to 216.42pts while, the Mining Index was stable at 338.71pts. Property concern Dawn led the fallers' pack after the group succumbed 17.43% to \$0.0720, trailed by Ariston that let go 8.76% to \$0.1907. Star Africa trimmed 2.70% to \$0.0360 while, beverages group Delta completed the top five losers on 2.22% loss to \$3.6129 on waning demand. Construction group Masimba extended 19.89% to \$0.2230 while, property concern FMP surged 13.88% to \$0.1600. Fintech group Cassava advanced 5.09% and settled at a vwap of \$1.4949 while, conglomerate Meikles jumped 2.80% to \$2.2000. Banking group CBZ completed the top five gainers of the day with a 1.55% lift to \$0.6307.

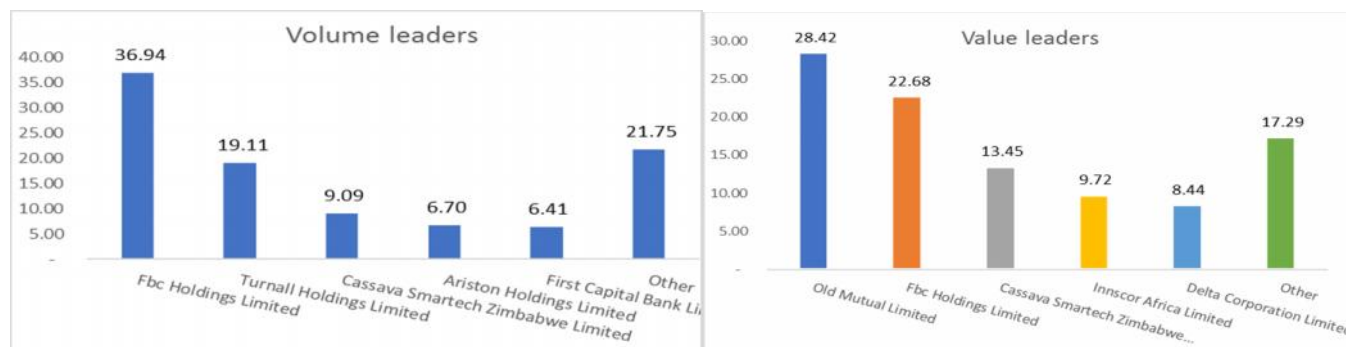
Twelve counters registered price movements in Thursday's session, distributed into five gainers and seven losers to see the market close with a negative breadth of two. Volume of shares traded dipped 91.64% to 1.26m while, turnover declined 83.31% to \$1.13m. FBC and Turnall were the top volume drivers of the day with respective contributions of 36.94% and 19.11%. Old Mutual, FBC and Cassava accounted for a combined 64.55% of the value outturn. Foreigners were net sellers in the session as sales stood at \$177,581.04 while, purchases were \$110,387.26.

Market Snapshot	Today	Previous	Change
Market Cap US\$	31,217,924,088	30,193,095,991	3.39
Turnover US\$	1,127,307.88	6,753,189.45	83.31
Foreign buys US\$	110,387.26	146,003.70	24.39
Foreign sales US\$	177,581.04	10,940.00	1523.23
No. of trades	100	191	47.64
Volume	1,257,194.00	15,043,005.00	91.64

Today's Gainers	Price	Change	%Change
Masimba Holdings Limited	22.30	3.70	19.89
First Mutual Properties Limited	16.00	1.95	13.88
Cassava Smartech Zimbabwe Limited	149.49	7.24	5.09
Meikles Limited	220.00	6.00	2.80
Cbz Holdings Limited	63.07	0.96	1.55

Today's Losers	Price	Change	%Change
Dawn Properties Limited	7.20	1.52	17.43
Ariston Holdings Limited	19.07	1.83	8.76
Dairibord Holdings Limited	48.29	1.71	3.42
Starafriacorporation Limited	3.60	0.10	2.70
Delta Corporation Limited	361.29	8.19	2.22

## Volume and value drivers



### OLD MUTUAL ZIMBABWE

Counter	PRICE(VWAP)	% CHANGE	LAST TRADED	VOL TRADED	HIGH (YTD)	LOW (YTD)	
OMZIL	\$34.5142	0.14	\$34.5000	37,000	\$38.0000	\$34.4668	\$170,174,021.90

### Dividend Monitor

Counter	LDR	Rate	Payment Date
Delta	22.11.19	\$0.0675	04.12.19
OKZim	29.11.19	\$0.0400	03.12.19
Zimplow	13.12.19	\$0.0314	16.12.19

### Upcoming Events

Company	Event	Venue	Time	Date
Axia	AGM	1 Henry Chapman Road, Eastlea, Harare	0815hrs	26.11.19
Innscor	AGM	Royal Harare Golf Club	0815hrs	04.12.19

### Cautionaries

ZHL	21.08.19	The company is engaged in negotiations that involve a potential transaction that may have a material impact on the price of the company's shares.
Meikles	21.08.19	The discussions to sell certain hospitality assets are on-going and the company will seek approval from shareholders for the proposed disposal.
Padenga	09.04.19	The company is considering a proposed transaction to diversify its business through investment into an alternative export-oriented business.
Getbucks	29.04.19	The company is contemplating a capital raising transaction which if successful will have a material effect on the share price.
Fidelity	19.07.19	The company is engaged in negotiations that involves restructuring the company's capital structure through the issue of shares and this might have a material impact on the value of shares.
Bindura	03.09.19	The company is engaged in a transaction that may have a material effect on the price of the company's shares.
MedTech	26.09.19	The directors are in discussions to sell certain operating assets of the company and also the acquisition of a business in a different sector.