



## RESEARCH – MARKET COMMENT

### Market Comment 29.10.2021

Index	Previous	Today	Move pts	Change %
Industrial	37,506.67	37,508.67	1.99	0.01
Mining	6,689.17	6,652.04	37.12	0.55
ZSE 10	7,104.99	7,085.20	19.79	0.28
ZSE ALL SHARE	11,329.48	11,329.57	0.09	0.00

SOURCE: ZSE

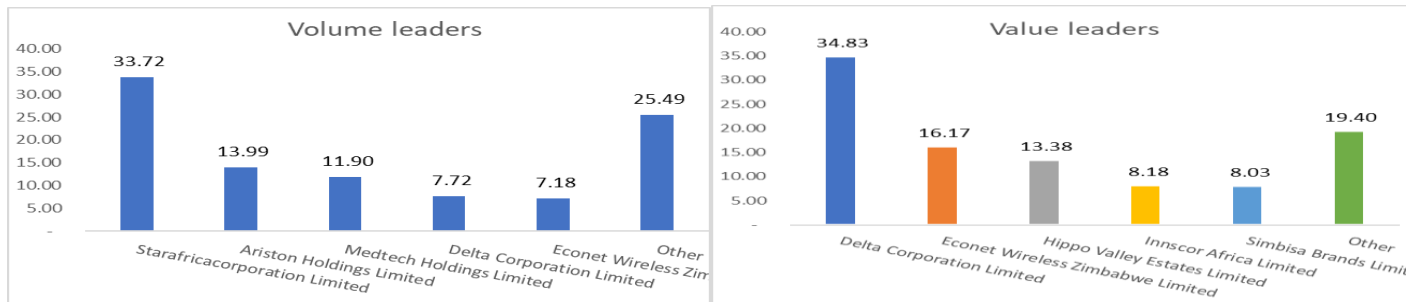
### ZSE scratches gains...

The market scratched gains in the month closing session as the benchmark indices in our review ended mixed. The mainstream All share Index inched up a negligible 0.0008% to 11329.57pts as the Industrials eked out a 0.01% to 37508.67pts. The Top Ten Index retreated 0.55% to close at 7085.20pts while, the Mining Index slipped 0.28% to end at 6652.04pts. CFI Holdings topped the gainers' list for the second consecutive session as the agriculture concern surged 19.89% to \$59.1500. Trailing was Mashonaland which jumped 17.19% to close at \$3.4741. National Foods advanced 6.67% to \$1,600.0000 while, Zimplot added 5.49% to end pegged at \$21.2692 apiece. Unifreight completed the top five winners of the day on a 4.29% rise to \$36.5000. Other notable risers were heavy caps Delta and Econet with 1.11% and 0.48% improvements in that order.

Banking group CBZ led the laggards of the day having dropped 19.79% to \$92.0519 followed by NMB which trimmed 7.56% to settle at \$12.0178. Medtech succumbed 4.34% to end at \$0.1633 as Turnall went down 3.79% to \$6.1000. Hotelier Rainbow Tourism Group capped the top five shakers of the day on a 2.45% fall to \$5.7000. The market registered a positive breath as gaining stocks outnumbered fallers by a count of ten. Activity aggregates were depressed as volume of shares traded declined 19.84% to 4.01m while, turnover retreated 35.37% to \$142.16m. Delta, Econet and Hippo anchored the value outturn with a combined contribution of 64.38% to the aggregate. Volume drivers of the day were Star Africa, Ariston and Medtech which claimed 33.72%, 13.99% and 11.90% apiece. Foreigners were net sellers in the session as sales stood at \$46.14m against purchases of \$2.41m. The Old Mutual ETF extended 1.88% to \$4.5848 as 4,070 units traded. Elsewhere, no trades were recorded on VFEX.

Market Snapshot	Today	Previous	Change
Market Cap ZWL \$	129,365,877,161	1,293,542,997,630	90.00
Turnover ZWL \$	142,162,807.20	219,963,365.78	35.37
Foreign buys ZWL \$	2,412,290.00	12,145,095.00	80.14
Foreign sales ZWL \$	46,138,895.00	37,928,952.35	21.65
No. of trades	436	569	23.37
Volume	4,009,297	5,001,856	19.84
Today's Gainers	Price	Change	% Change
Cfi Holdings Limited	5,915.00	985.00	19.98
Mashonaland Holdings Limited	347.41	50.95	17.19
National Foods Holdings Limited	160,000.00	9,999.80	6.67
Zimplot Holdings Limited	2,126.92	110.62	5.49
Unifreight Africa Limited	3,650.00	150.00	4.29
Today's Losers	Price	Change	% Change
Cbz Holdings Limited	9,205.19	2,271.37	19.79
Nmbz Holdings Limited	1,201.78	98.22	7.56
Medtech Holdings Limited	16.33	0.74	4.34
Turnall Holdings Limited	610.00	24.00	3.79
Rainbow Tourism Group Limited	570.00	14.29	2.45

**Volume and value drivers**



**VICTORIA FALLS STOCK EXCHANGE (USD)**

COUNTER	PRICE (USD\$)	%CHANGE	LTP	HIGH	LOW	VOL TRADED	VALUE TRADED (USD)
PADENGA	-	-	-	0.3600	0.1800	-	-
SEEDCO INTERNATIONAL	-	-	-	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\$	4.5848	1.88	5.1500	1.0000	5.1500	4,070	18,660.0000

**Dividend Monitor**

Counter	LDR	Rate	Payment Date
INNSCOR	15.10.2021	\$1.8000	10.11.2021
NATIONAL FOODS	15.10.2021	\$2.9649	10.11.2021
TSL LIMITED	12.11.2021	\$0.1700	22.11.2021

**Upcoming Events**

Company	Event	Venue	Time	Date
ECONET WIRELESS	A.G.M	2 OLD MUTARE ROAD, MSASA, HARARE	10.00hrs	29.10.2021
NATIONAL FOODS	A.G.M	10 STIRLING ROAD, WORKINGTON	08.45hrs	08.11.2021
MedTech	EGM	619 CNR SHUMBA AND HACHA ROADS, RUWA	09.00hrs	15.11.2021
MEIKLES HOLDINGS	A.G.M	VIRTUAL	09.00hrs	18.11.2021

**Cautionaries**

Medtech	26.11.20	The company is engaged in discussions at holding company level to transform Medtech into an investment holding company and if this transaction is concluded this might have a material impact on the price of shares.
Meikles	15.04.21	Company published cautionary statement on the unbundling and separate listing of Tanganda Tea Company Limited
Ariston	03.06.2021	The company is negotiating a transaction which if successfully completed may have material impact on the value of the company shares.
CBZ HOLDINGS	28.07.2021	The company is negotiating a transaction which if successfully completed may have material impact on the value of the company shares.
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.

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