

Market Comment 30.10.2015

Index	Previous	Today	Move pts	Change %
Industrial	131.12	130.83	0.29	0.22
Mining	23.57	23.57	0.00	0.00

SOURCE: ZSE

Foreigners drive month ending session...

It was a moderately active Friday and month ending session, an unusual characteristic as most local Fund Managers will be watching the market from the sidelines. Volumes swelled 132.07% to 2.80mn shares while values grew 48.30% to \$463,385. The surge in activity was underlined by increased foreign participation which saw the buys making up 80.29% of turnover and sales 71.35% of the same. Innskor that was thinly traded for the larger part of this month following full disclosure of the Simbisa Brands spinoff, was external investors' favourite stock at 88.96% of their purchases and 91.27% of their disposal. The renewed interest in the conglomerate coincided with the company's announcement for its 19th AGM set for 20 November 2015 for the ordinary business of the day. Other external inflows were in DELTA, PADENGA and OLD MUTUAL while outflows were in PADENGA, OK and TURNALL.

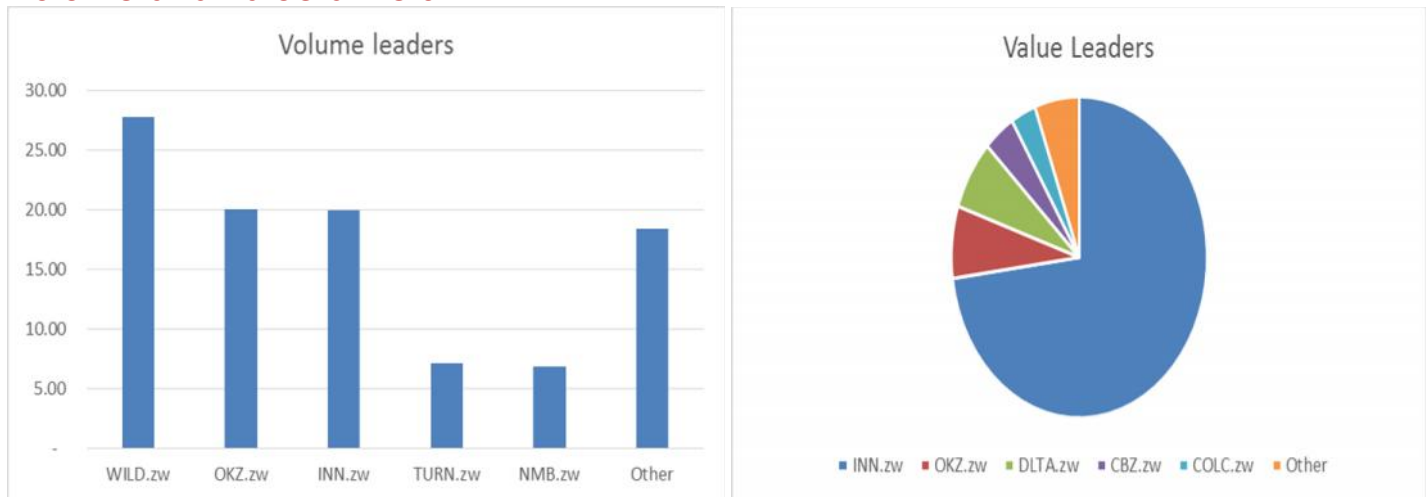
Industrials ended the month in the red on 0.29pts or 0.22% fall, reversing the last four day's rally. Depressing it were INNSCOR which gave up 0.76% to \$0.6045, subsidiary COLCOM that fell 12.21% to \$0.2107, MEIKLES that fell 5% \$0.0950, FML that shed 2.22% to \$0.0220 and OLD MUTUAL which declined 2.11% to \$2.2200. Trending in the positive was brick makers WILLDALE that jumped 58.33% to \$0.0019, PADENGA up 11.06% to \$0.0884, CFI which rose 6.52% to \$0.0490, HIPPO that eked 0.66% to \$0.3523 and FIDELITY that marginally gained 0.45% to \$0.1105. The Mining Index closed the week at previous level of 23.57pts as BINDURA traded steady at \$0.01300 while the rest of the cluster was quiet.

Market Snapshot	Today	Previous	% Change
Market Cap US\$	3,416,105,219	3,423,558,574	0.22
Turnover US\$	463,385	312,457	48.30
Foreign buys US\$	372,077	110,985	235.25
Foreign sales US\$	330,631	102,989	221.04
No. of trades	45	35	28.57
Volume	2,798,241	1,205,759	132.07

Gainers	Price	Change	% Change
WILD.zw	0.19	0.07	58.33
PHL.zw	8.84	0.88	11.06
CFI.zw	4.90	0.30	6.52
HIPO.zw	35.23	0.23	0.66
FIDL.zw	11.05	0.05	0.45

Losers	Price	Change	%Change
COLC.zw	21.07	2.93	12.21
MEIK.zw	9.50	0.50	5.00
FML.zw	2.20	0.05	2.22
OML.zw	220.00	4.75	2.11
INN.zw	60.45	0.46	0.76

Volume and value drivers



Dividend Monitor

<u>Counter</u>	<u>LDR</u>	<u>Rate</u>	<u>Payment Date</u>
NFOOD	09.10.15	4.65c	10.11.15
COLCOM	09.10.15	1.8c	10.11.15
INNSCOR	09.10.15	0.55c	10.11.15

Upcoming Events

<u>Company</u>	<u>Event</u>	<u>Venue</u>	<u>Time</u>	<u>Date</u>
INNSCOR	EGM	Royal Harare Golf Club, Harare	09.00AM	02.11.15
DELTA	Analyst Briefing	Mandel Training Centre	15.00AM	11.11.15
AFDIS	AGM	St Mannock's Lomagundi Harare	11.00AM	04.11.15
COLCOM	AGM	Colcom Offices 1/3 Coventry Harare	09.00AM	13.11.15
NATFOODS	AGM	Gloria House 10 Sterling road Harare	08.30AM	18.11.15
OKZIM	Analyst Briefing	OK Mart, 30 Chiremba Road	16.00PM	12.11.15
INNSCOR	AGM	Royal Harare Golf Club, Harare	08.15AM	20.11.15