

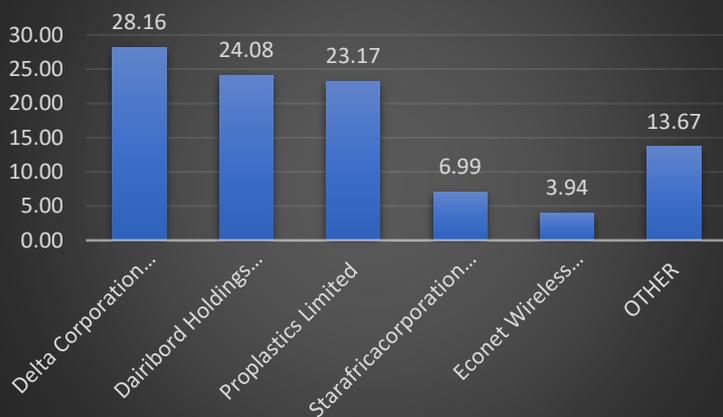


TODAY'S GAINERS	PRICE (ZiG \$)	% CHANGE
Ariston Holdings Limited	0.0336	4.64
Starafriacorporation Limited	0.0419	4.52
Tn Cybertech Investments Holdings Limited	0.1218	1.51
Tanganda Tea Company Limited	1.0980	1.02
Meikles Limited	3.5500	0.94

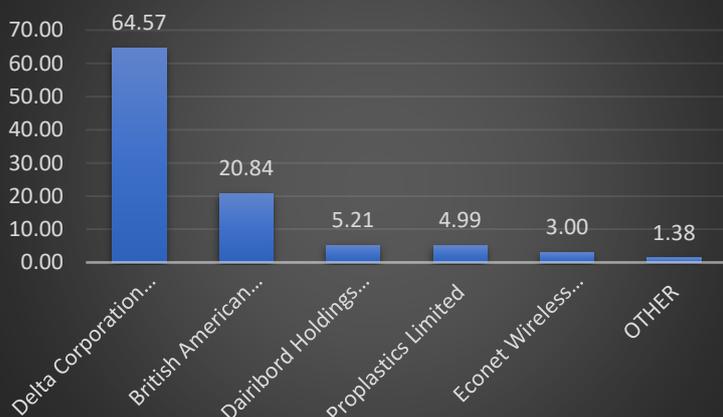
TODAY'S LOSERS	PRICE (ZiG \$)	% CHANGE
British American Tobacco Zimbabwe Limited	90.0000	13.00
Amalgamated Regional Trading (Art) Holdings Limited	0.1455	9.06
Unifreight Africa Limited	1.1300	6.30
Zb Financial Holdings Limited	3.2020	6.17
Cbz Holdings Limited	7.0563	2.00

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap ZWL \$	60,203,907,138	0.65
Turnover ZWL \$	9,113,351.34	75.02
Foreign buys ZWL \$	92,000.00	95.00
Foreign sales ZWL \$	55,835.90	99.78
Volume	1,510,800.00	99.68

VOLUME LEADERS



VALUE LEADERS



INDEX	TODAY (PTS)	CHANGE %
ZSE ALL SHARE	207.16	0.60
ZSE 10	202.02	0.71
ZSE-Agriculture	177.13	3.74
Mid-Cap	247.50	0.20

ZSE downturns in week-opening session...

The market downturned in week opener as the All-Share Index eased 0.60% to 207.16pts while, the Top Ten Index fell 0.71% to 202.02pts. The Agriculture Index retreated 3.74% to 177.13pts on the back of losses in BAT. The Mid-Cap Index went down by 0.20% to 247.50pts. Topping the dawdlers' list of the day was BAT that sank 13.00% to \$90.0000 while, ART slumped 9.06% to \$0.1455. Logistics and transport services provider Unifreight lost 6.30% to \$1.1300 as ZB Financial Holdings dropped 6.17% to \$3.2020. Capping off the top five worst performers of the day was CBZ Holdings Ltd that dipped 2.00% to \$7.0563. Trading in the positive territory was Ariston that rose 4.64% to \$0.0336 as sugar refiner Star Africa followed after adding 4.52% to \$0.0419. TN Cybertech Investments jumped 1.51% to \$0.1218 while, tea producer Tanganda firmed 1.02% to \$1.0980. Retailer Meikles concluded the top five risers of the day as it edged up 0.94% to \$3.5500.

Market activity was depressed in the session as the volume plunged 99.68% to 1.51m shares while, value outturn plummeted 75.02% to \$9.11m. Delta, Dairibord and Proplastics drove the volume aggregate as the trio claimed a combined contribution of 75.41%. Delta was the major value driver as it claimed 64.57% while, notably BAT made a significant 20.84% contribution. Tigere REIT ticked up 0.24% to \$1.3232 on 10,197 units. The Datvest ETF MCS gained 1.45% to \$0.0300 as 5,280 units traded. Trading in the negative was Morgan MIZ that fell 6.25% to \$0.0450 while, Morgan and Co MCS shed 0.45% to \$2.1500.



EFE RESEARCH – MARKET COMMENT

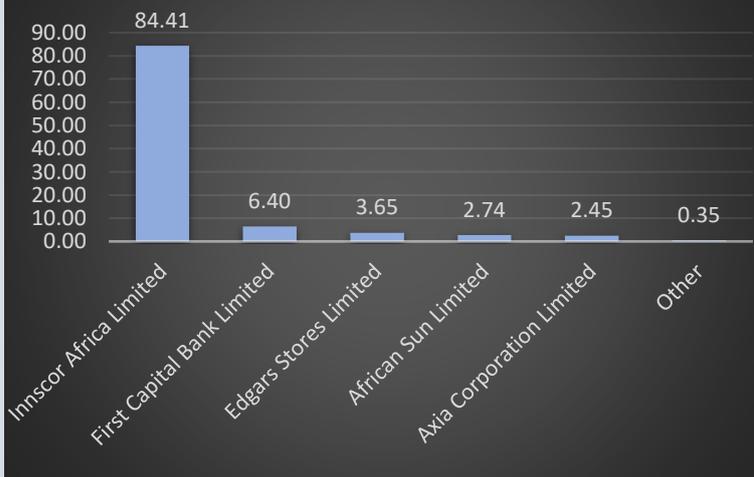
04.08.2025

TODAY'S GAINERS	PRICE(USD\$)	% CHANGE
Axia Corporation Limited	0.0900	7.91
Edgars Stores Limited	0.0132	5.60
Padenga Holdings Ltd	0.3106	0.10
	-	-

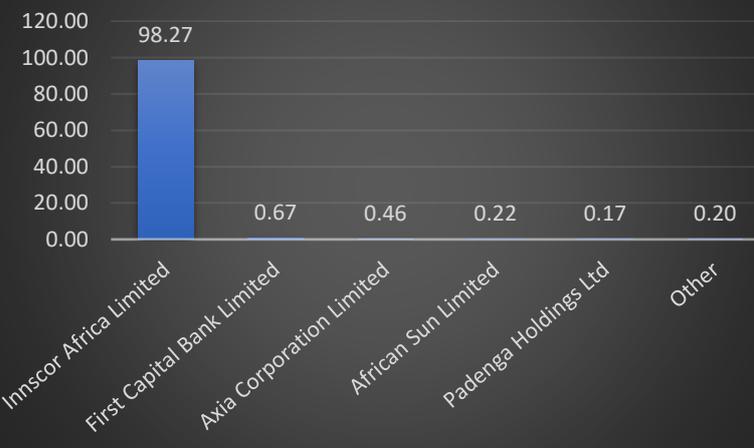
TODAY'S LOSERS	PRICE(USD\$)	% CHANGE
Simbisa Brands Limited	0.3605	6.05
Innscor Africa Limited	0.5601	0.67
First Capital Bank Limited	0.0505	0.39

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap USD\$	1,287,049,550	0.88
Turnover USD\$	26,324	5.53
Volume	54,721	76.94

VOLUME LEADERS



VALUE LEADERS



INDEX	TODAY (PTS)	CHANGE %
VFEX ALL SHARE	120.28	0.80

VFEX commences new week in the red...

The VFEX continued to falter as the All-Share Index dropped 0.80% to 120.28pts in the first session of the week. Quick-service restaurant Simbisa headlined the laggards of the day on a 6.05% decrease to \$0.3605 while, conglomerate Innscor slid 0.67% to \$0.5601. Completing the losers of the day was First Capital Bank which slipped 0.39% to \$0.0505. Topping the gainers' list was retail and distribution group Axia that rose 7.91% to \$0.0900 as, clothing retailer Edgars grew 5.60% to \$0.0132. Crocodile farmer and gold miner Padenga capped the top performers of the day on a 0.10% uplift to \$0.3106.

Activity aggregates were mixed as turnover went up 5.53% to \$26,324.00 while, volumes traded plummeted 76.94% to 54,721 shares. Innscor was the major contributor to the volume and value aggregates as the group claimed 84.41% of the former and 98.27% of the latter.



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04.08.2025

OMZIL Price

Price (VWAP ZWG\$)	Last Price (ZWG\$)	% Change	Traded Volume	Turnover
4.5700	4.5700		-	-

Dividend Monitor

COUNTER	LAST CUM-DIV	RATE	PAYMENT DATE
SEEDCO LIMITED	03.09.2025	USD\$0.0091	11.09.2025
SEEDCO INTERNATIONAL	29.08.2025	USD\$0.0072	11.09.2025
FIRST MUTUAL HOLDINGS	30.07.2025	USD\$0.0016	08.08.2025
TIGERE REIT	06.08.2025	0.04775 US cents	15.08.2025

Upcoming Events

COMPANY	EVENT	VENUE	TIME	DATE
UNIFREIGHT	AGM	ROYAL HARARE GOLF CLUB/VIRTUAL	10.00am	08.08.2025

Cautionaries

FML	12.01.2024	Following a response from a forensic investigation on First Mutual Life Assurance a subsidiary of First Mutual Holdings arising from the asset separation exercise initiated by IPEC. Company received a response from IPEC indicating that the Commission was mandated by the Minister to institute corrective measures.
NMB	06.03.2024	The Directors of NMBZ Holdings Limited (“the Company”) wish to advise all shareholders and the investing public that the Company is involved in negotiations for a potential acquisition of a complementary business.
NAMPAK	23.10.2024	The Directors of the Company wish to advise all its shareholders and the investing public that Nampak Limited (“Nampak”), through its wholly owned subsidiary, Nampak Southern Africa Holdings Limited (“Seller”), has entered into negotiations which have culminated in the acceptance by the Seller of a binding offer from TSL Limited, (“Purchaser”) for the acquisition by the Purchaser of the Seller’s 51.43% shareholding in the Company (the shares of which are listed on the Zimbabwean Stock Exchange) for a purchase consideration of US\$ 25,000,000. Shareholders are advised to exercise caution when dealing in the Company’s securities.
TSL	23.10.2024	Shareholders of TSL Limited and the investing public are advised that the Company has made an Offer for the acquisition of 51.43% shareholding in Nampak Zimbabwe Limited to Nampak Southern Africa Holdings Limited which Offer has since been accepted. The Offer is for a purchase consideration of US\$25 million. The Company and Nampak SAHL are now engaged in processes to finalise and execute the Sale and Purchase Agreement. Shareholders are advised to exercise caution when dealing in the Company’s securities.
RIOZIM	04.03.2025	Shareholders are at an advanced stage in negotiating with the potential investor who will inject an initial amount of USD twenty million into the working capital of the company, through an appropriate financial instrument, whilst completing a purchase of the majority shares of the company.



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