

ZSE stays in the negative territory...

	Previous	Current	Change(pts)	%Change	YTD %
All Share	203.32	200.84	2.48	1.22	7.69
Industrial	203.19	200.70	2.49	1.22	7.67
Top 10	199.20	196.22	2.98	1.50	8.84
Mid Cap	238.62	238.18	0.43	0.18	4.65

The ZSE market stayed in the negative territory as the primary All Share Index slid a further 1.22% to 200.84pts while, the Industrial Index declined by a similar 1.22% to 200.70pts. The Blue-Chip Index dipped 1.50% to close at 196.22pts while, the Mid Cap Index fell 0.18% to 238.18pts reducing its YTD gains to 4.65%. Elsewhere, Nampak Limited, concluded a sale and purchase agreement to dispose of a 51,43% stake in its local unit to TSL Limited, subject to regulatory and other suspensive conditions.

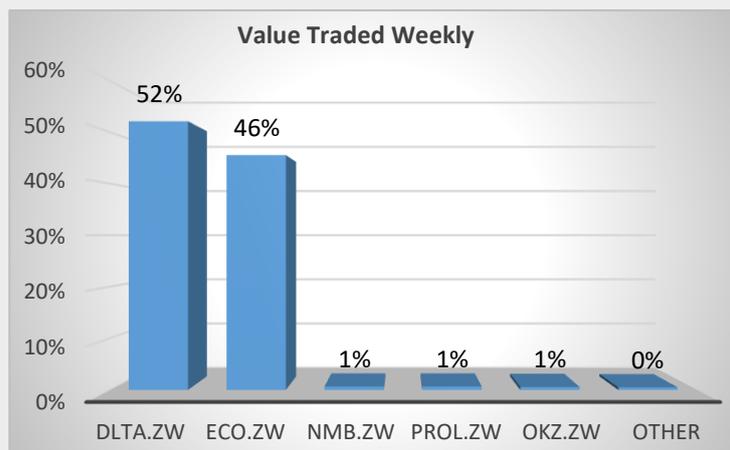
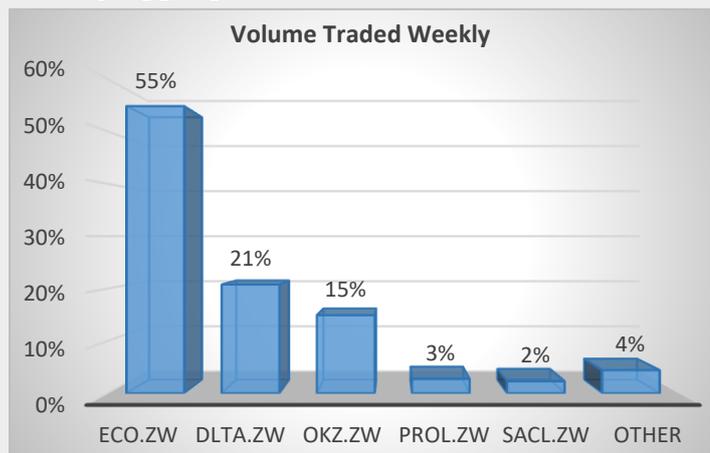
RISERS	PRICE(ZiG\$)	% Change
ARIS.ZW	0.0389	29.63
WILD.ZW	0.0350	16.45
RTG.ZW	0.8125	11.07
NPKZ.ZW	1.0000	3.09
TANG.ZW	1.1783	2.24
DLTA.ZW	13.8995	0.34
CBZ.ZW	7.0593	0.07
SEED.ZW	3.6925	0.07
ZBFH.ZW	3.0575	0.01

The risers and fallers spectrum was evenly distributed at nine, while five counters traded unchanged. Banking group FBC was the major victim of the day after succumbing 15.58% to close at \$ 6.5000, where demand could be established. Sugar refiners Star Africa followed on a 11.77% plunge that took it to \$0.0420 on selling pressure. NMB lost 3.64% to \$3.6135 with heavy cap Econet sliding 1.35% to close at \$4.5755 on weakening demand. Retailer OKZIM was 0.81% lower at \$0.2105 while, ZSE Holdings continued to lose its glitter, having fallen 0.45% week on week and closed at \$2.0900. TN Cybertech trimmed 0.36% to \$0.1196 on the back of selling pressure. The duo of Hippo Valley Estates and Meikles lost an identical 0.01% to end at respective prices of \$6.5000 and 3.5002.

FALLERS	PRICE(ZiG)	% Change
FBC.ZW	6.5000	15.58
SACL.ZW	0.0420	11.77
NMB.ZW	3.6135	3.64
ECO.ZW	4.5755	1.35
OKZ.ZW	0.2105	0.81
ZSEH.ZW	2.0900	0.45
TNCI.ZW	0.1196	0.36
HIPO.ZW	6.5000	0.01
MEIK.ZW	3.5002	0.01

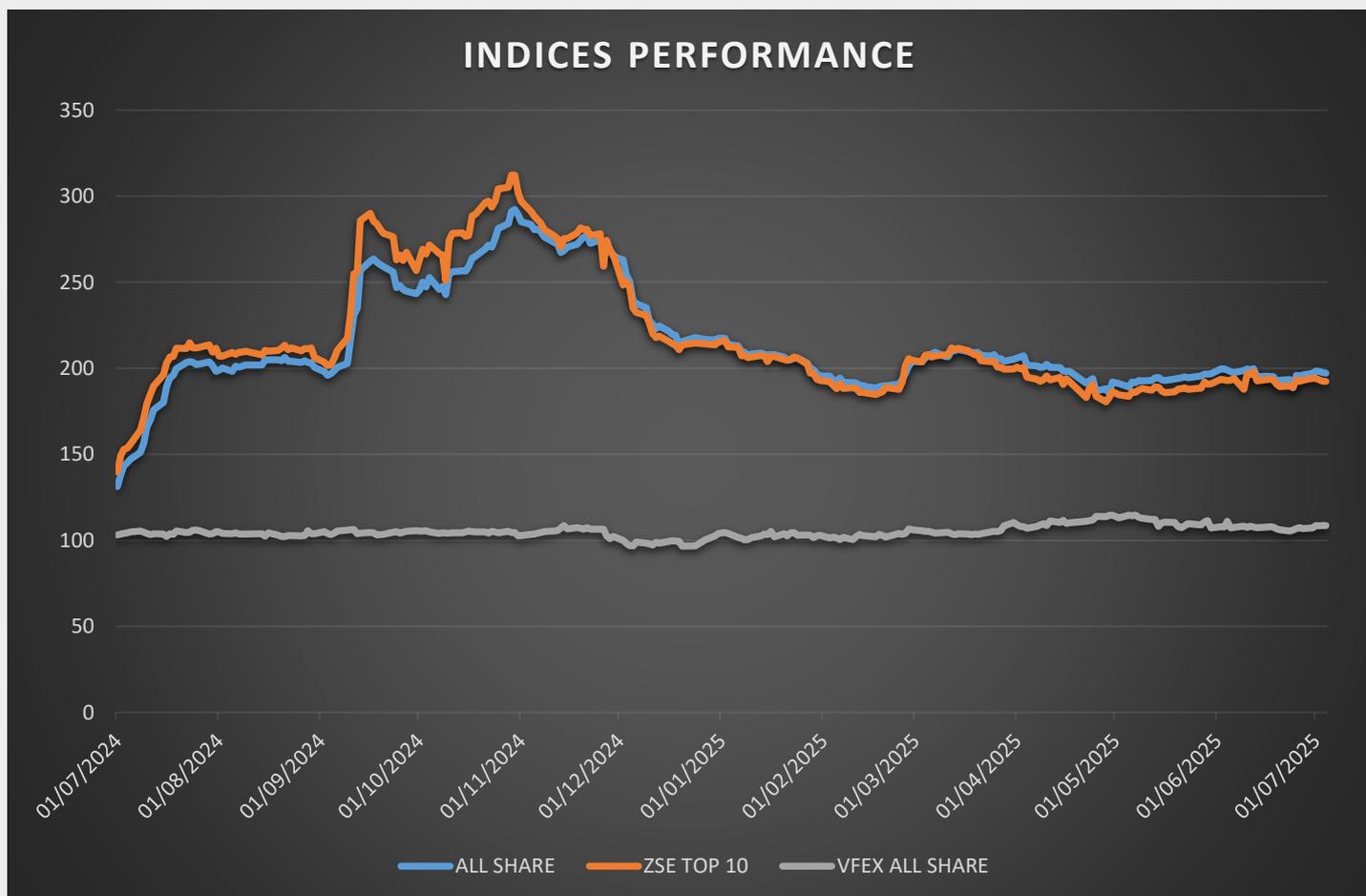
Topping the winners of the week was agricultural concern Ariston which went up 29.63% during the holiday shortened week. Trailing behind was brick maker Willdale which ticked up 16.45% to settle at \$0.0350 while, RTG added 11.07% to end at \$0.8125, where supply could be established. Nampak rose 3.09% to \$1.0000 while, Tanganda advanced 2.24%, post-announcement that the tea processor is finalising the preparation of a circular to shareholders ahead of a US\$8mn capital raise. Top Capitalised counter Delta continued to shine as it added 0.34% week on week to settle at \$13.8995 while, CBZ Holdings and SeedCo added an identical 0.07% to close at \$7.0593 and \$3.6925 in that order. ZB rose 0.01% to \$3.0575 and completed the risers set of the week.

Activity aggregates falter...



	Previous	Current	Change	%Change
Values	60,830,066.38	58,837,947.41	1,992,118.97	3.27
Volumes	236,853,200	10,624,800	226,228,400	95.51

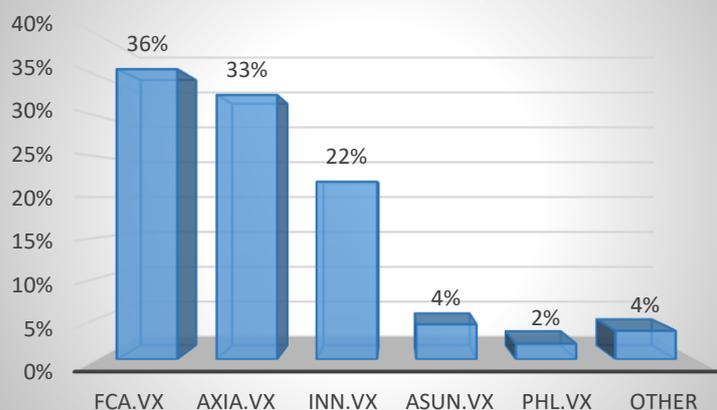
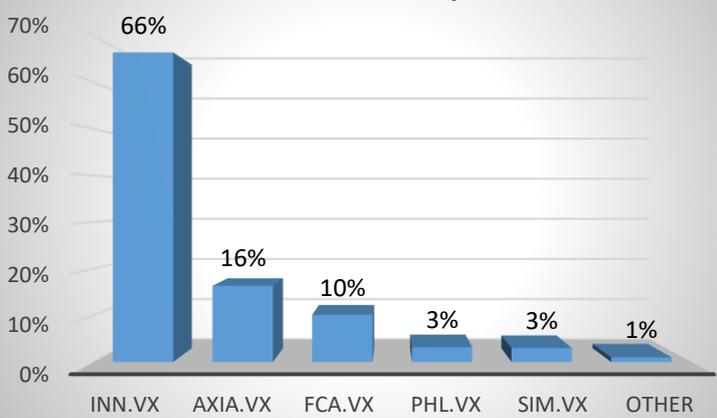
Activity aggregates remained depressed in the holiday shortened week as reflected in all measures which closed in the red. Volumes declined 95.51% to 10.62m shares, yielding a value outturn of \$58.84m which was 3.27% down from last week. Econet and Delta were the most sought after stock during the week as it anchored both the volumes and values, claiming a combined 76% and 98% of the totals respectively.



RISERS	PRICE (US\$)	% Change
FCA.VX	0.0545	3.61
PHL.VX	0.3203	1.59
INN.VX	0.5825	0.54
SCIL.VX	0.2159	0.37

LOSSERS	PRICE	% Change
EDGR.VX	0.0108	18.18
ASUN.VX	0.0320	16.88
AXIA.VX	0.0964	0.21
SIM.VX	0.3700	0.03

MARKET SNAPSHOT	WEEK	%CHANGE
Values (US\$)	365,186.95	43.43
Volumes	1,901,183	13.91

Volume Traded Weekly

Value Traded Weekly


INDEX	TODAY (PTS)	CHANGE %	YTD
VFEX ALL SHARE	122.76	0.09	17.94

VFEX stretches losses in holiday shortened week

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The VFEX market stayed in red in the holiday shortened week as the All-Share Index fell 0.09% to 122.76pts. Apparel retailer Edgars led the laggards of the week on a 18.18% dip to \$0.0108, followed by hotelier African Sun that dropped 16.88% to \$0.0320. Axia slipped 0.21% to close at \$0.0964 while, fast foods group Simbisa eased 0.03% to end the week pegged at \$0.3700. Trading in the positive territory was First Capital Bank that shot up 3.61% to \$0.0545 while, Padenga charged 1.59% to \$0.3203. Conglomerate Inncor went up 0.54% to settle at \$0.5825 while, seed producer SeedCo capped the risers of the week on a 0.37% uplift to \$0.2159.

Activity aggregates declined in the week under review as the volumes traded dropped 13.91% to 1,901,183 shares while, turnover declined 43.43% to \$365,186.95. Top volume drivers of the week were First Capital Bank (36%), Axia (33%) and Inncor (22%). The duo of Inncor and Axia highlighted the total value traded during the week after contributing 66% and 16% respectively.

NEWS

Tea producer, Tanganda Tea Company Limited, says it is finalising the preparation of a circular to shareholders ahead of a US\$8 million capital raise.

<https://www.newsday.co.zw/business/article/200044966/tanganda-finalises-us8m-capital-raise>

SOUTH African packaging group, Nampak Limited, has concluded a sale and purchase agreement to dispose of a 51,43% stake in its local unit to TSL Limited, subject to regulatory and other suspensive conditions.

<https://www.newsday.co.zw/business/article/200044938/nampak-concludes-sale-of-zim-unit-to-tsl>

FBC Holdings Limited has urged the Reserve Bank of Zimbabwe (RBZ) to come up with a clear framework on de-dollarisation to reduce pressure on foreign currency reserves.

https://www.newsday.co.zw/business/article/200044965/be-clear-on-de-dollarisation-fbc-urges-rbz#goog_fullscreen_ad

THE Zimbabwe Stock Exchange Holdings (ZSEH) has begun international roadshows to woo foreign investors back to local capital markets, after participation plunged 50% in the past five years, according to estimates.

<https://www.newsday.co.zw/business/article/200044913/zseh-pushes-roadshows-to-attract-foreign-investors>

JERSEY-DOMICILED miner, Caledonia Mining Corporation, has reported a strong balance sheet in the second quarter of the financial year following the sale of its solar business for US\$22,35 million.

<https://www.newsday.co.zw/business/article/200044895/caledonia-reports-positive-balance-sheet-after-solar-plant-sale>

OK Zimbabwe Limited has raised US\$20 million through its renounceable rights offer, which was fully subscribed following strong shareholder participation and underwriting support.

<https://www.newsday.co.zw/business/article/200044867/lifeline-as-ok-raises-us20m-from-shareholders>

CFI Holdings revenue for the third quarter ended June 30, 2025 grew 9,9 percent in inflation adjusted terms to ZiG675 million from ZiG614,15 million prior year on volume growth across major units.

<https://fingaz.co.zw/2025/08/14/cfi-revenue-up-10-percent/>

NEDBANK Group says it remains committed to the Zimbabwean market which continues to show immense potential by providing financial inclusion to areas with limited banking infrastructure.

<https://fingaz.co.zw/2025/08/14/nedbank-sees-potential-in-zimbabwe/>

FIDELITY Life Assurance Zimbabwe's profit after tax more than doubled to US\$6,1 million in the year ended May 30, 2025, driven by higher insurance contract revenue and gains from unquoted equity investments, the financial services concern has said.

<https://www.newsday.co.zw/business/article/200044896/fidelity-life-records-jump-in-profit-after-tax>



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