

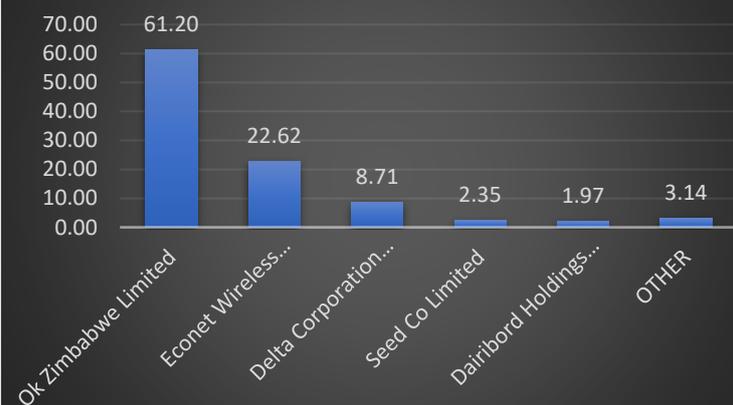


TODAY'S GAINERS	PRICE (ZiG \$)	% CHANGE
Dairibord Holdings Limited	2.1454	14.73
Starafriacorporation Limited	0.0450	12.50
Cbz Holdings Limited	8.8600	10.74
British American Tobacco Zimbabwe Limited	91.6667	7.84
Fbc Holdings Limited	7.7778	1.27

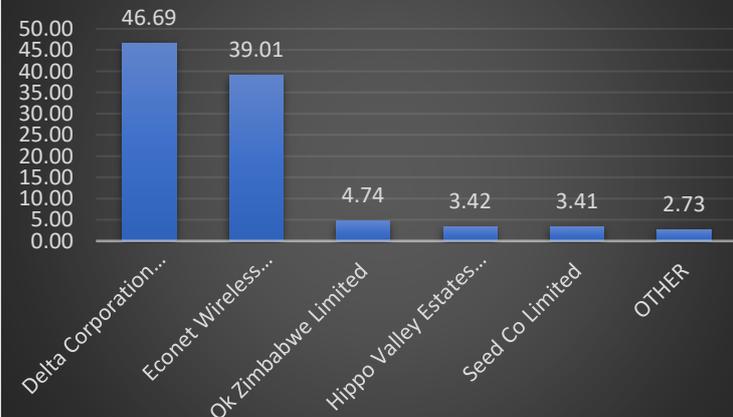
TODAY'S LOSERS	PRICE (ZiG \$)	% CHANGE
Tanganda Tea Company Limited	0.9500	5.82

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap ZWG \$	61,024,358,421	1.45
Turnover ZWG\$	7,636,088.60	96.75
Foreign buys ZWG\$	560,050.00	79.25
Foreign sales ZWG \$	1,238,600.00	93.22
Volume	2,907,900.00	94.48

VOLUME LEADERS



VALUE LEADERS



INDEX	TODAY (PTS)	CHANGE %
ZSE ALL SHARE	209.32	1.41
ZSE 10	206.91	1.54
ZSE-Agriculture	177.97	3.20
Mid-Cap	237.56	0.93

ZSE records gains in the penultimate session of the month...

ZSE recorded gains in the penultimate session of the month as the All-Share Index rose by 1.41% to 209.32pts while, the Blue-Chip Index edged up 1.54% to 206.91pts. The ZSE Agriculture Index added 3.20% to 177.97pts while, the Mid Cap Index gained 0.93% to 237.56pts. Dairy producer Dairibord led the gainers of the day on a 14.73% surge that took it to \$2.1454 as sugar refiner Star Africa followed on a 12.50% jump to end pegged at \$0.0450. Banking group CBZ Holding garnered 10.74% to \$8.8600 while, BAT went up 7.84% to end pegged at \$91.6667. Banking group FBC Holdings capped the top five gainers of the day on a 1.27% rise to land at \$7.7778. On the contrary, Tanganda Tea Company was the sole loser of the day having lost 5.82% to finish at \$0.9500. The market registered a positive breadth of twelve as thirteen counters gained against one that faltered.

Activity aggregates faltered in the session as turnover plunged 96.75% to \$7.64m while, volumes traded plummeted 94.48% to 2.91m shares. OKZIM and Econet claimed a combined 83.82% of the total volumes traded. Delta and Econet were the top value drivers of the day as they claimed a combined 85.70% of the total value traded. Foreigners were net sellers in the session as inflows amounted to \$560,050.00 while, outflows stood at \$1,238,600.00. The Datvest MCS ETF was stable at \$0.0300 as 1,200 units were traded while, the Tigere REIT traded 49,846 units at an unchanged price of \$1.1500.



TODAY'S GAINERS	PRICE(USD\$)	% CHANGE
Padenga Holdings Ltd	0.3827	19.86
First Capital Bank Limited	0.0528	5.39
Edgars Stores Limited	0.0102	2.00
Simbisa Brands Limited	0.3700	1.62
Innskor Africa Limited	0.5971	0.56

TODAY'S LOSERS	PRICE(USD\$)	% CHANGE

MARKET SNAPSHOT	TODAY	%CHANGE
Market Cap USD\$	1,370,592,772	3.44
Turnover USD\$	717,900.00	2727.61
Volume	1,838,703	1861.16

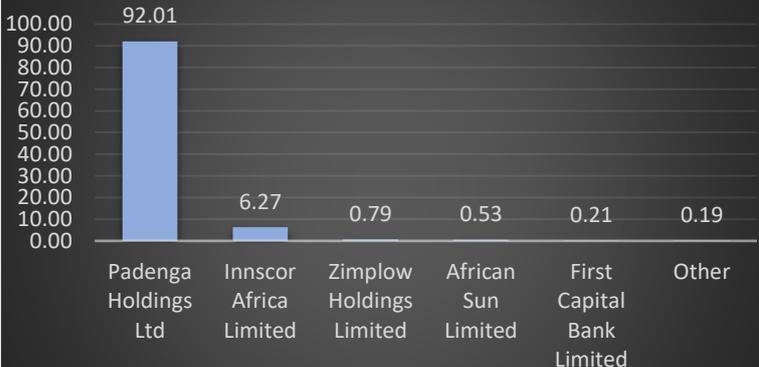
INDEX	TODAY (PTS)	CHANGE %
VFEX ALL SHARE	128.93	4.25

Padenga highlights the session...

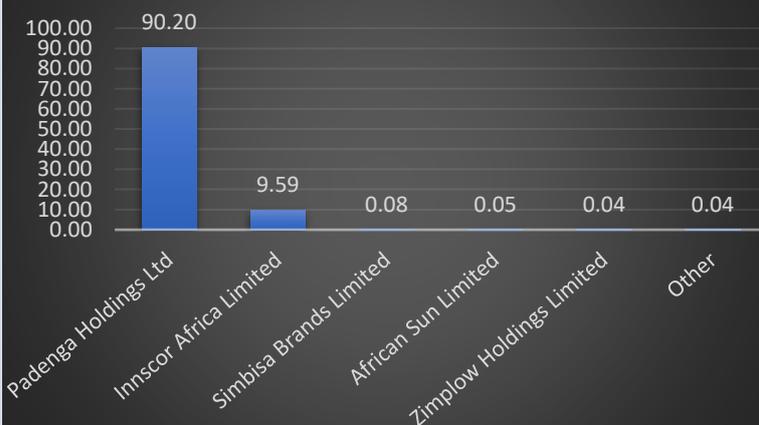
Padenga highlighted the session as 1.69m shares worth \$647,519.03 exchanged hands. The trade accounted for 92.01% of the volume aggregate and 90.20% of the total value traded. Activity aggregates enhanced in the session as turnover soared 2727.61% to \$717,900 while, volumes traded ballooned 1861.16% to 1.84m shares.

The VFEX All Share Index charged 4.25% to 128.93pts. Padenga Holdings headlined the gainers of the day having surged 19.86% to finish at \$0.3827 with First Capital Bank trailing on a 5.39% rise to \$0.0528. Edgars Stores ticked up 2.00% to \$0.0102 while, Simbisa Brands firmed up 1.62% to \$0.3700. Conglomerate Innskor completed the gainers of the day on a 0.56% advance to close at \$0.5971.

VOLUME LEADERS



VALUE LEADERS





EFE RESEARCH – MARKET COMMENT

28.08.2025

OMZIL Price

Price (VWAP ZWG\$)	Last Price (ZWG\$)	% Change	Traded Volume	Turnover
7.0000	7.5000	12.90	216	1,607.50

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

Upcoming Events

COMPANY	EVENT	VENUE	TIME	DATE
UNIFREIGHT	AGM	ROYAL HARARE GOLF CLUB/VIRTUAL	10.00am	29.08.2025
SEED CO INTERNTIONAL	AGM	VIRTUAL	11.00pm	05.09.2025
SEED CO LIMITED	AGM	VIRTUAL	12.00pm	05.09.2025
RTG	AGM	RAINBOW TOWERS HOTEL	12.00pm	08.09.2025

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.



EFE RESEARCH – MARKET COMMENT
28.08.2025