

ZSE MARKETS

NEWSLETTER

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ABOUT ZSE MARKETS



The ZSE Markets is responsible for the ZSE primary and secondary markets which comprise of new and existing listings, product development, market data, trading and operations.

This issue of the ZSE Markets Newsletter, provides market highlights on the performance of the ZSE for the period 1 April to 30 June 2022.

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Q2 2022 MARKET HIGHLIGHTS

- The ZSE recorded a total market turnover of ZWL\$35 billion in Q2 2022, representing 71% increase from the previous quarter. In comparison to the same period last year (Q2 2021), the market turnover recorded a 202% jump from ZWL\$11 billion.
- The market capitalisation rose by 24% from the previous quarter, to end at ZWL\$2.44 trillion. This represents a 227% increase from the same comparative period last year.
- ZSE All Share Index recorded gains of 25% from Q1 2022 to Q2 2022 to close at 19,791.94 points. On year to year basis the index rose by 219% from Q2 2021.
- The ZSE introduced a new index named ZSE ETF Index at the beginning of Q2 2022 to measure the performance of ZSE listed ETFs. The index was back tested to January 2022 and gained 157% since then. In Q2 2022 the ZSE ETF Index gained 13% to settle at 256.86 points.
- Foreign investor participation accounted for 10% of Q2 2022 trades and 22% of Q2 2021 trades.

COMPARISON OF Q2 2022 AND Q1 2022

	Q2 2022	Q1 2022	% Change
Turnover	ZWL\$35Billion	ZWL\$20Billion	71%
Volume	ZWL\$660 Million	ZWL\$353Million	86.7%
Number of Trades	35,776	35,861	0.24%
Foreign Trades	ZWL\$3.4Billion	ZWL\$1.6Billion	113%
ZSE All Share	19791.94	15858.92	24.8%

COMPARISON OF Q2 2022 AND Q2 2021

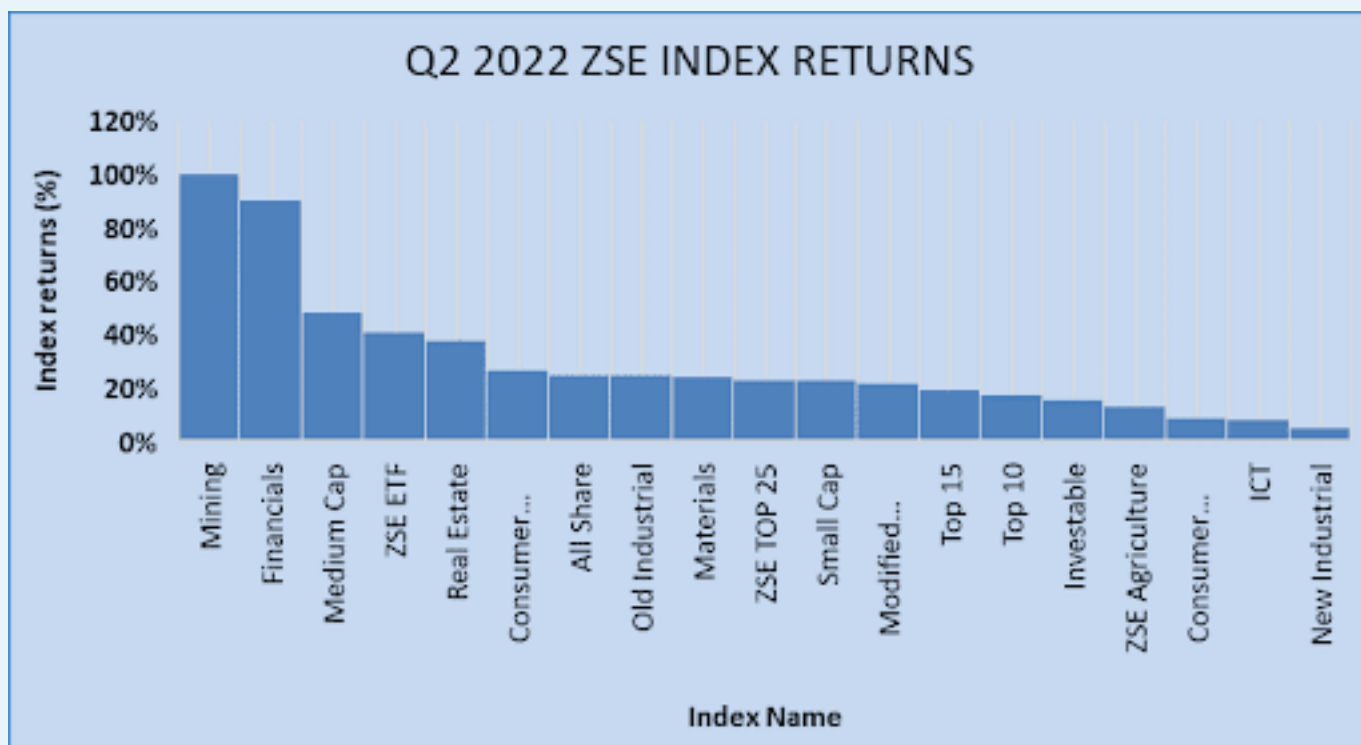
	Q2 2022	Q2 2021	% Change
Turnover	ZWL\$35Billion	ZWL\$12Billion	200%
Volume	ZWL\$660 Million	ZWL\$646Million	2.2%
Number of Trades	35,776	26,097	37%
Foreign Trades	ZWL\$3.4Billion	ZWL\$2.5Billion	36%
ZSE All Share	19791.94	6194.88	219%

Q2 2022 INDICES PERFORMANCE

- The ZSE All Share Index which is the measure of the overall market performance gained 25% in Q2 2022 to close at 19,791.94 points. In comparison to Q1 2022 which recorded gains of 47% the overall market's growth slowed down in Q2 2022.
- The ZSE top 10 Index which is the blue-chip index on the ZSE added 17% to close at 12,273.75 points in Q2 2022. The index gained significantly by 289% from Q2 2021.
- The minerals resources index otherwise known as the ZSE Mining Index recorded the highest gains of 99% to close at 20,021.24 points in Q2 2022.

Q2 2022 INDICES PERFORMANCE

- Below is a graphical presentation showing all ZSE indices returns during Q2 2022.



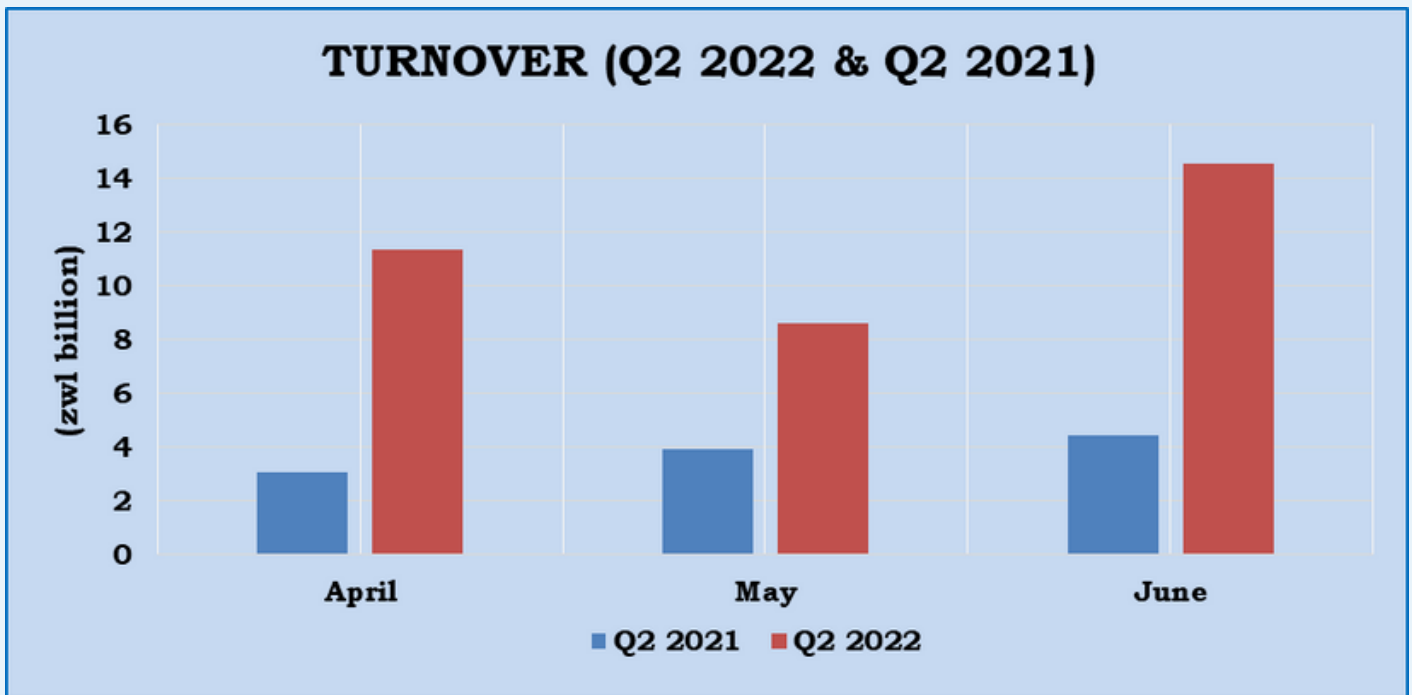
TURNOVER

Equities

- Q2 2022 recorded a turnover figure of \$35 billion and this represents 71% increase from the previous quarter's turnover.
- In comparison to the same period last year (Q2 2021), the market turnover recorded a 202% jump from ZWL\$11 billion
- The top five traded companies during the period under review were ECO.zw (\$9 billion), DLTA.zw (\$6.5 billion), INN.zw (\$4.20 billion), SIM.zw (\$2.7 billion) and EHZA.zw (\$1.5 Billion). The total turnover for the top 5 companies contributed 70% of the total turnover for Q2 2022.

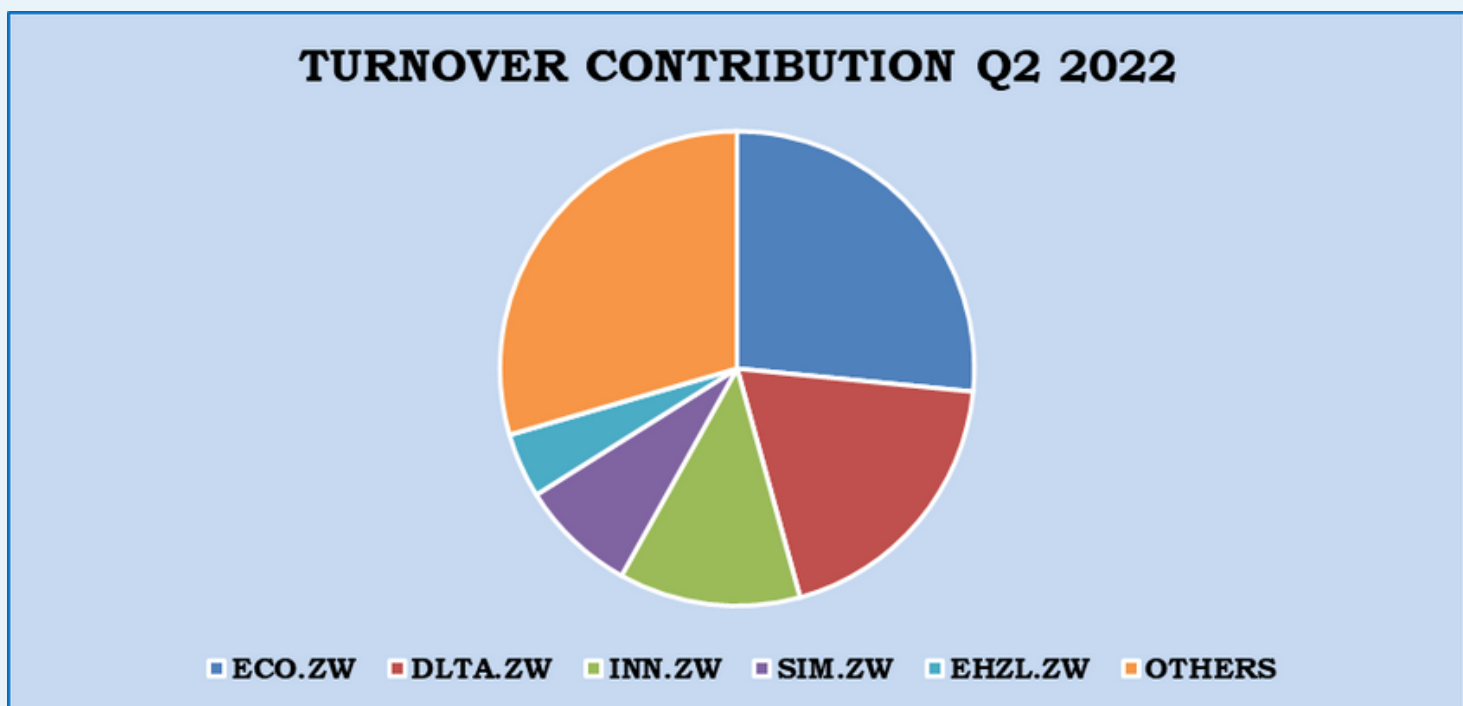
TURNOVER

- The graph below shows the comparison of turnover between Q2 2022 and Q2 2021.



TURNOVER CONTRIBUTION

- The chart below shows the turnover contributions for Q2 2022.



EXCHANGE TRADED FUNDS

- The ZSE introduced a new index named ZSE ETF Index at the beginning of Q2 2022 to measure the performance of ZSE listed ETFs. The index was back tested to January 2022 and gained 157% since then. In Q2 2022 the ZSE ETF Index gained 13% to settle at 256.86 points.
- The total number of ETF listings has grown to four in Q2 2022. This was a reflection of the introduction of Morgan & Co Made In Zimbabwe Exchange Traded Fund. On comparative basis the ZSE had only one ETF in Q2 2021.
- The total value traded on the ETF board was \$164 million and the total number of ETF units that exchanged hands in Q2 2022 was 47 million units.
- The market capitalisation for the ETFs was ZWL\$8.8 billion at the end of Q2 2022 and this was due to the introduction of Morgan & Co Made in Zimbabwe Exchange Traded Fund.

The graph below shows the overall growth of the ETF Market capitalisation.



MOVERS AND SHAKERS

- During Q2 2022 a total of 53 counters traded; Of the 53 counters that traded, 42 counters recorded gains whilst 10 lost ground and one remained unchanged.

Top Five Price Movers

- The table below shows the share price performance of the top five movers by percentage price movement for Q2 2022

Symbol	Price at 31-Mar-2022	Price at 30-June-2022	% Change
CFI.ZW	122.00	370.00	203.28
FCA.ZW	4.50	12.23	171.83
GBZW.ZW	6.20	16.00	158.06
NMB.ZW	12.00	28.67	138.89
TANG.ZW	93.96	217.95	131.96

TOP FIVE PRICE SHAKERS

- The table below shows the share price performance of the top five shakers by percentage price movement for Q2 2022.



Symbol	Price at 31-Mar-2022	Price at 30-June-2022	% Change
MMDZB.ZW	34.00	26.00	-23.53
BAT.ZW	3666.00	2975.00	-18.85
HIPO.ZW	316.00	276.00	-12.66
SIM.ZW	216.04	194.31	-10.06
ARIS.ZW	3.24	3.06	-5.34

FOREIGN TRADES

- Foreign investor participation was 10% in Q2 2022 and this represents a two percent increase from Q1 2022 which was 8% of the total trades.
- Q2 2022 recorded net sells position of \$4.4 billion.

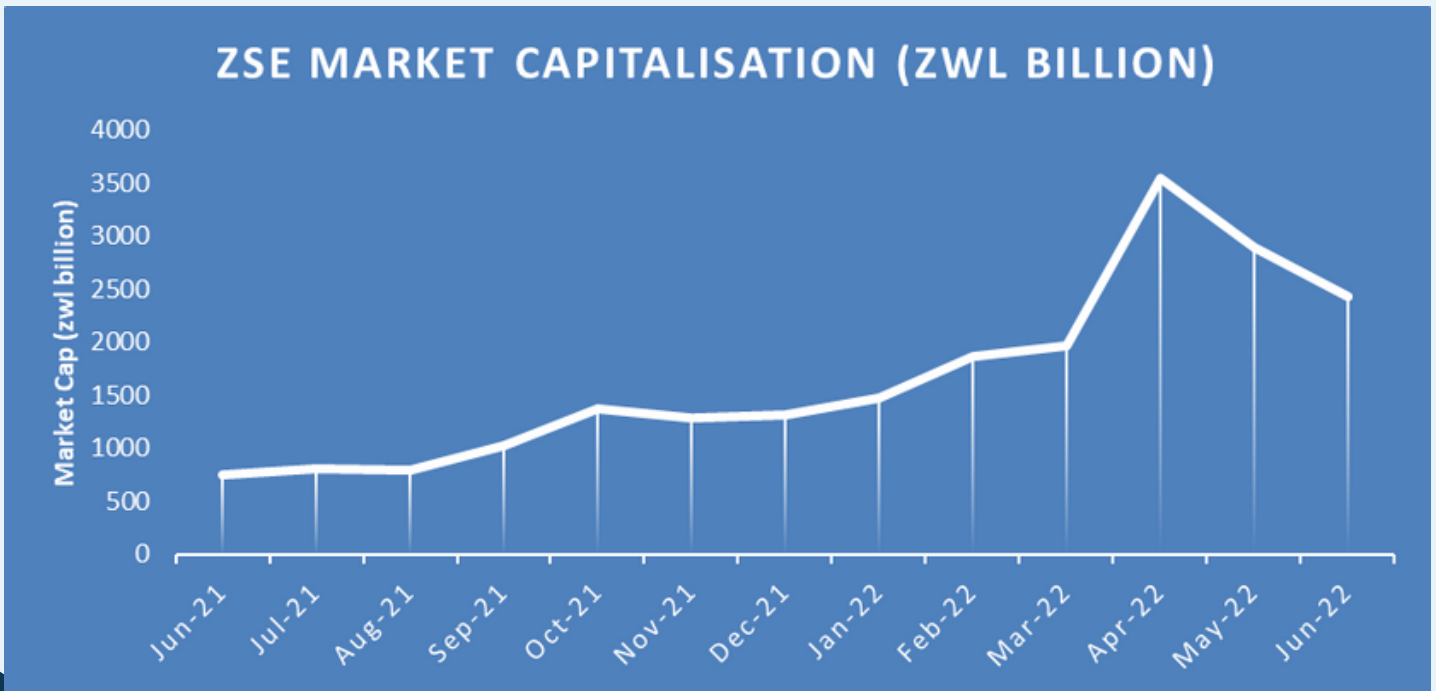
FOREIGN TRADES

- The table below shows foreign trades movement in 2022

Period	2022	2022	2022
	RTGS -Millions	RTGS -Millions	
	Purchases	Sells	Net
January	52.64	254.00	-201.36
February	658.59	821.09	-162.51
March	781.44	740.57	+40.87
April	609.16	1,078.81	-469.65
May	271.85	1,544.76	-1,272.91
June	330.75	3,012.11	-2,681.36
Cumulative	2,704.43	7,451.34	-4,746.91

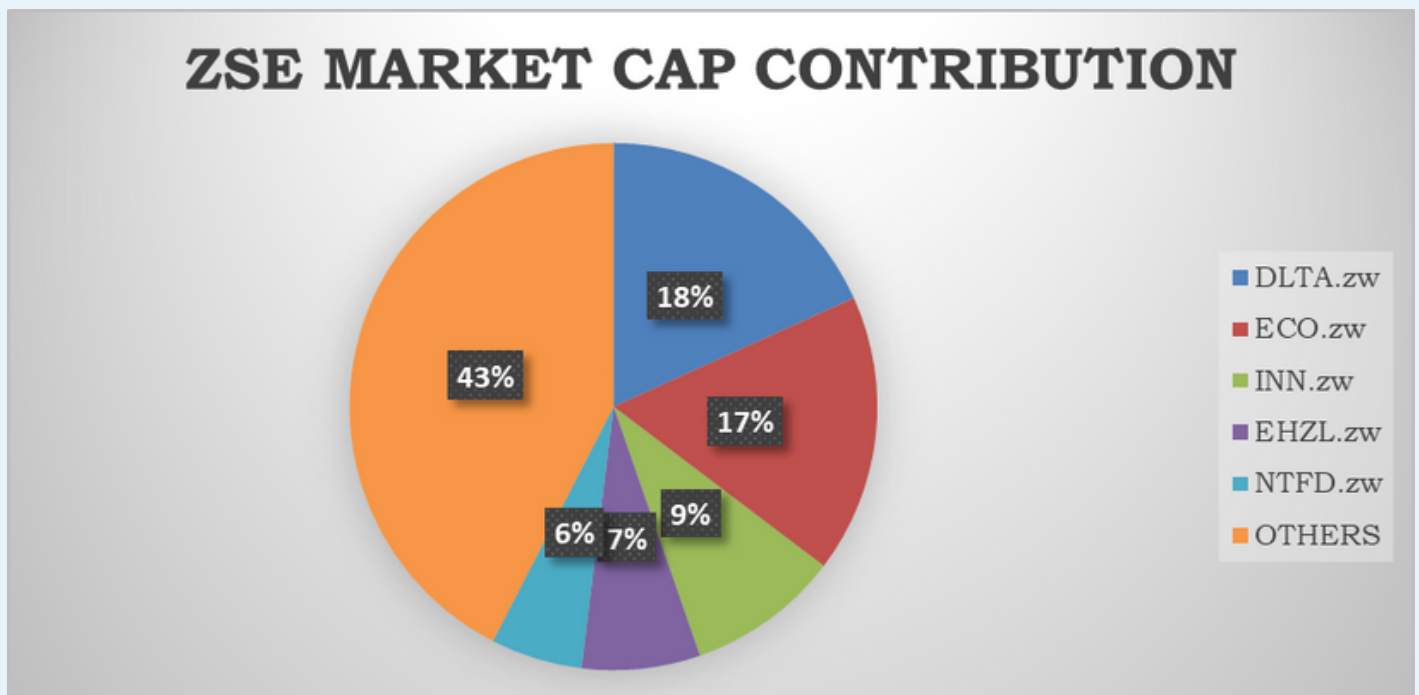
MARKET CAPITALISATION

- The ZSE market capitalisation for Q2 2022 closed at \$2.44 trillion, representing a 24% increase from the previous quarter.



Market Cap Contribution

- The top five biggest contributors to market cap were DLTA.ZW, ECO.zw, INN.zw, EHZL.zw and NTFD.zw which contributed 18%, 17%, 9%, 7% and 6% respectively.
- The rest of the counters contributed 43% of the market cap in Q2 2022.



ZSE DIRECT

ZSE Direct is a web-based platform, which was specifically designed with the retail investor in mind to make the process of accessing the stock market easier for first-time investors on the ZSE.

KEY FEATURES OF ZSE DIRECT



ZSE Direct has key features which include;

My Portfolio

- allows an investor to view the holdings that are under their portfolio.

Market depth

- shows the 10 best orders on both the buy and the sell-sides.

Market Statistics and Counter Performance

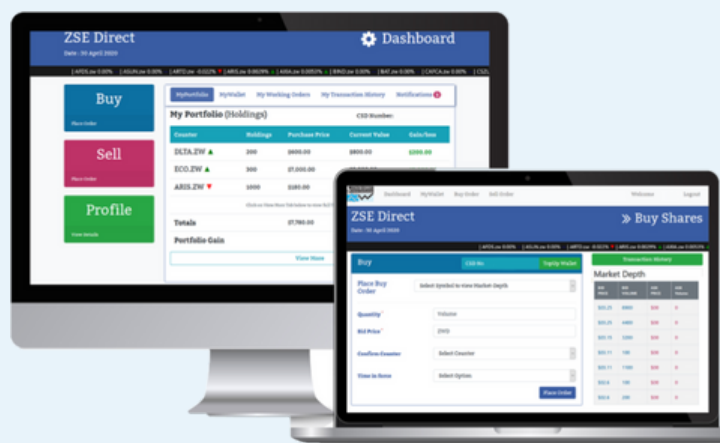
- shows the latest market statistics including the market watch, top movers, and the indices to help one track the performance of the market.

ZSE Direct Instant

- enables the sell proceeds of an investor to be credited to their ZSE Direct wallet on the same day after a successful matched and confirmed sell order.

Odd Lot Board

- enables all ZSE Direct clients to place bids or offers for volumes from 1 up to 99.



ZSE DIRECT STATISTICS

- The table below shows the % change of the performance on ZSE Direct in Q2 2021 and Q2 2022.

Indicator	Q2 2021	Q2 2022	% Change
Total Traded Value	ZWL\$ 49,384,567.88	ZWL\$153,967,246.59	211.77%
Total Traded Volume: Sells	5,403,993	6,195,084	14.63%
Buys	11,812,369	16,471,827	39.44%
Number of trades	7,734	12,310	102.67%
Number of active users	3,048	7,471	145.11%

- The Table below shows the % change of the performance on ZSE Direct in Q1 2022 and Q2 2022.

Indicator	Q1 2022	Q2 2022	% Change
Total Traded Value	ZWL\$107,134,434.85	ZWL\$153,967,246.59	43.71%
Total Traded Volume: Sells	4,498,742	6,195,084	37.70%
Buys	14,923,553	16,471,827	10.37%
Number of trades	12,718	12,310	-3.2%
Number of active users	6,402	7,471	16.69%

ZSE Direct

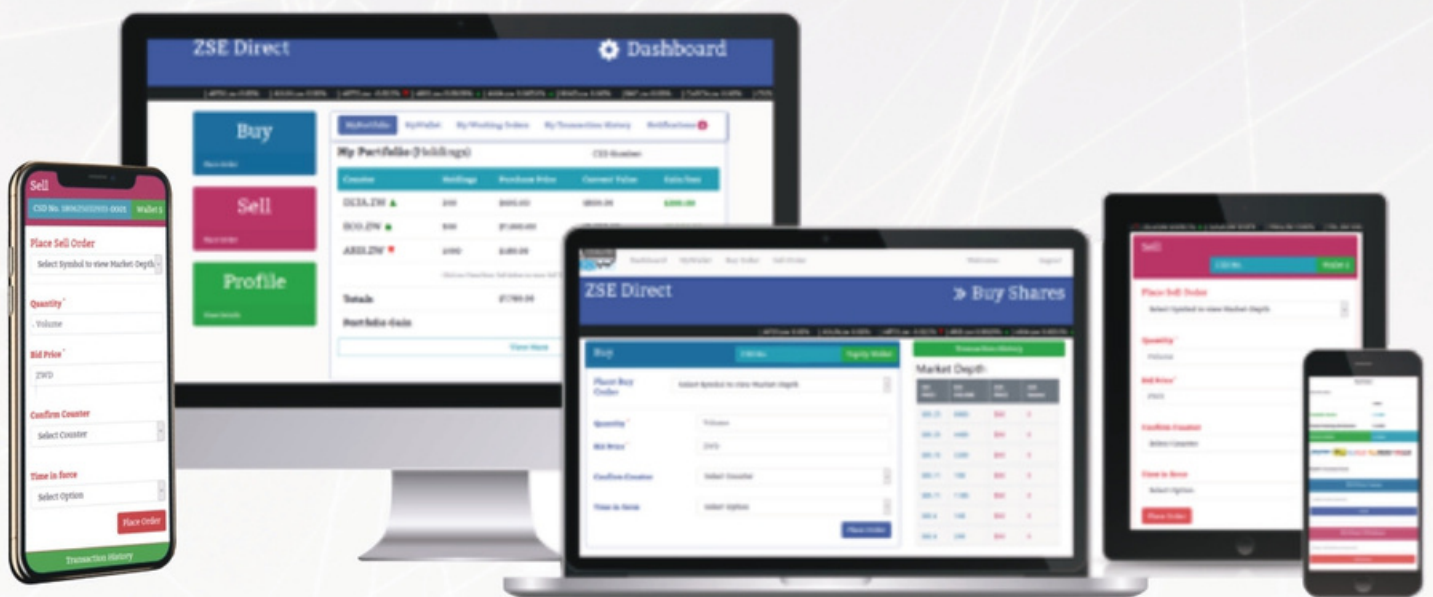
ZSE Direct is the official online trading platform of the Zimbabwe Stock Exchange

ZSE Direct provides retail investors with a smart way to manage their ZSE investments online.

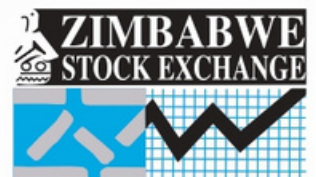
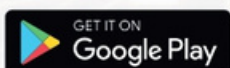
ZSE Direct makes it easy to buy and sell securities listed on the ZSE and has the following key features:

- User friendly interface
- Your portfolio indicating securities in your securities account
- Latest market statistics
- The market depth feature showing up to 10 best orders on both the buy and sell side
- Price range on Buy and Sell tabs
- Crediting of sell proceeds to your ZSE Direct wallet on the same trading day after a successful matched and confirmed sell order
- Placing of bids or offers for volumes from 1 up to 99

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