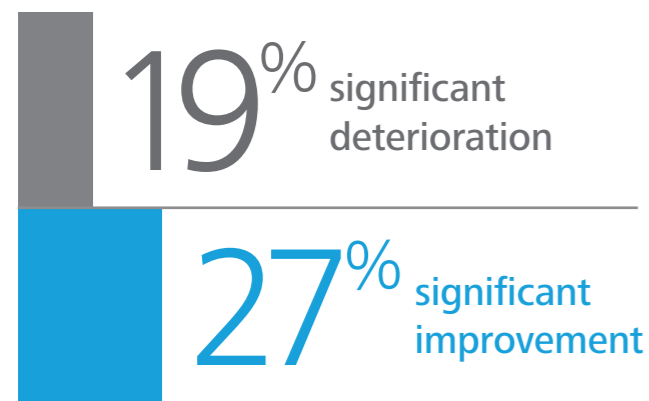


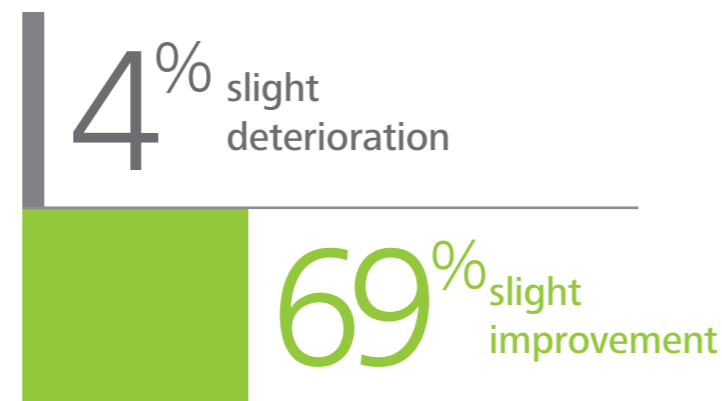


• Expected company performance

2014 CFOs' expected company performance levels



2015 CFOs' expected company performance levels



• Top industry concerns



Financial health of primary customers



Sustainability factors relevant to industry



Competitiveness of the local market



Threat of nationalisation/government interventions in industries

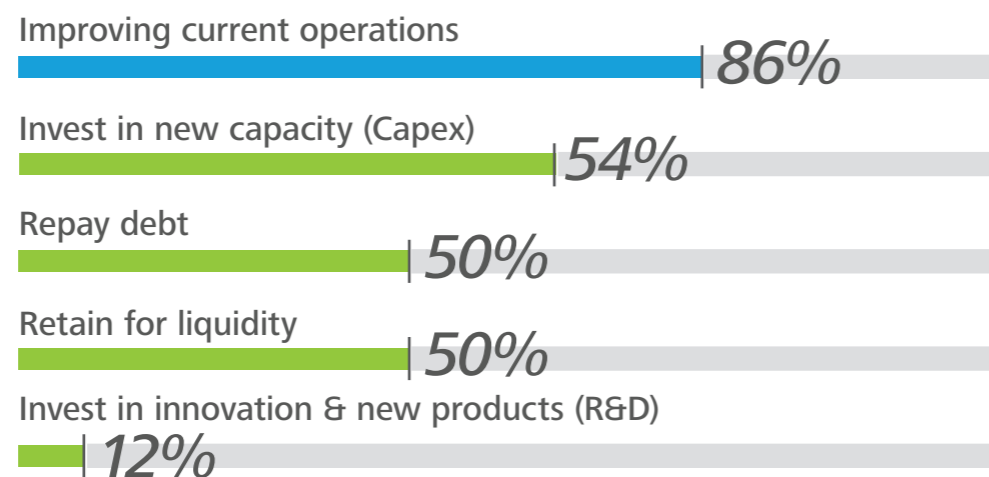


Competitiveness of the local market

• Top cash flow priorities



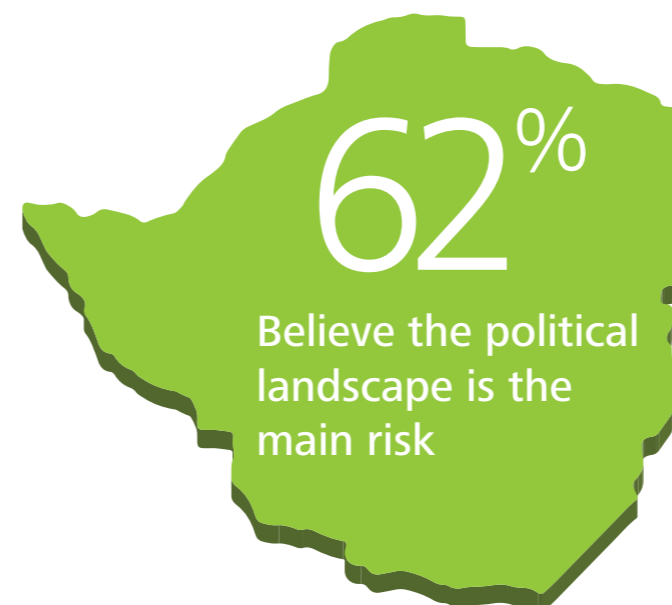
CFOs' top cash flow priorities



Improving current operations is a key area of focus for Zimbabwean CFOs.

• Highest risk factors

Aligned to the market sentiment, the main risk faced by CFOs is the political risk in Zimbabwe.



60% Credit monitoring and management processes for customers

50% Margin deterioration due to lack of pricing flexibility