



# ONE Minute Brief

16 NOVEMBER 2020



 Economic and Political News

**African National Congress (ANC) leader Ace Magashule has been granted bail in corruption case.**



**Cosatu has threatened to withdraw election support for ANC over wage move.**



**Health Minister Zweli Mkhize stated that South Africa is not experiencing a second wave of Covid-19 infections, but only cluster outbreaks.**



**Human Settlements, Water & Sanitation Minister Lindiwe Sisulu stated that government will distribute land not houses.**



**Deputy chief justice Raymond Zondo's recusal hearing will be tabled today for hearing.**



 South Africa Market 

South African markets closed in the green on Friday, helped by gains in platinum and gold mining sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 57,182.60		▲ 52,517.57		▼ 11,496.79	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
151.41	0.27	181.86	0.35	-202.77	-1.73
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	10.64	NA	10.63	NA	21.53
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-4.75	0.17	-5.13	3.35	-6.08	-26.66

 US Market 

US markets closed higher on Friday, on hopes for a potential Covid-19 vaccine.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 3,585.15		▲ 11,829.29		▲ 29,479.81	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
48.14	1.36	119.70	1.02	399.64	1.37
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	9.64	NA	8.41	NA	11.24
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-2.77	10.97	-2.29	31.84	-4.61	3.30

JSE All Share

S&P 500

 Top Gainers

RMB Holdings Ltd	5.1%	-5.6%
Royal Bafokeng Platinum Ltd	4.3%	-5.3%
Telkom SA SOC Ltd	4.0%	-4.9%
Pan African Resources Plc	3.2%	-4.7%
Montauk Holdings Ltd	3.1%	-4.6%

Top Losers 

Investec Property Fund Ltd	
SA Corporate Real Estate Ltd	
Emira Property Fund Ltd	
Mediclinic International Plc	
Italtile Ltd	

 Top Gainers

MGM Resorts International	9.3%	-5.1%
Host Hotels & Resorts Inc	8.5%	-2.2%
Marathon Petroleum Corp	8.2%	-1.7%
Simon Property Group Inc	8.0%	-1.2%
Valero Energy Corp	7.7%	-1.2%

Top Losers 

Cincinnati Financial Corp	
Market Access Holdings Inc	
Etsy Inc	
IPG Photonics Corp	
NVIDIA Corp	

 UK Market ▼

UK markets finished lower on Friday, amid weakness in the British Pound.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 6,316.39		▲ 13,076.72		▲ 5,380.16	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-22.55	-0.36	23.77	0.18	17.59	0.33
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	13.25	NA	13.15	NA	17.11
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-4.92	-16.26	-9.44	-1.30	-4.36	-10.00

 Asia Market ▲

Asian markets are trading higher this morning, amid upbeat economic data from China and Japan. The Nikkei 225 Index is trading 2.0% higher at 25,891.88.

\*As at 6:00 SAST

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Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▲ 25,891.88		▲ 3,342.22		▲ 26,263.71	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
506.01	1.99	32.12	0.97	106.85	0.41
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	10.48	NA	2.65	NA	8.50
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.90	7.31	0.20	8.52	2.76	-7.21

FTSE 100

 Top Gainers

M&G Plc	4.8%	-3.9%
Legal & General Group Plc	4.2%	-3.3%
Rolls-Royce Holdings Plc	4.1%	-2.7%
Lloyds Banking Group Plc	3.7%	-2.7%
Whitbread Plc	3.6%	-2.4%

Top Losers 

Halma Plc		
Experian Plc		
Associated British Foods Plc		
Intertek Group Plc		
RELX Plc		

Nikkei 225


 Top Gainers


Japan Post Holdings Co Ltd	9.1%	-3.5%
T&D Holdings Inc	7.8%	-1.9%
Mitsui Fudosan Co Ltd	6.7%	-1.6%
Kawasaki Kisen Kaisha Ltd	6.4%	-1.2%
Hino Motors Ltd	6.2%	-1.1%


Top Losers 

Z Holdings Corp		
DeNA Co Ltd		
Eisai Co Ltd		
Micro Inc/Japan		
CyberAgent Inc		

 Currencies





**USD**  **USD/ZAR**


**ZAR**  **15.4698**

**▼ -0.25%**

At 06:00 SAST, the US Dollar retreated against the South African Rand.  
The US Dollar fell against the South African Rand on Friday.





**GBP**  **GBP/ZAR**


**ZAR**  **20.4621**

**▼ -0.01%**

At 06:00 SAST, the British Pound is trading slightly weaker against the South African Rand.  
The British Pound declined against the South African Rand on Friday.





**EUR**  **EUR/ZAR**


**ZAR**  **18.3332**

**▼ -0.10%**

At 06:00 SAST, the Euro fell against the South African Rand.  
The Euro weakened against the South African Rand on Friday.




**AUD**  **AUD/ZAR**

**ZAR**  **11.2743**

**▼ -0.003%**

At 06:00 SAST, the Australian Dollar is trading marginally lower against the South African Rand.  
The Australian Dollar eased against the South African Rand on Friday.

 Commodities




**▲ 1.01%**

**Brent (\$/barrel)**

**43.21**

At 06:00 SAST, Brent crude oil rose.  
On Friday, Brent crude oil dropped, amid rising Covid-19 cases and rise in US rig count.

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**▲ 0.38%**

**Gold (\$/oz)**

**1893.3**

At 06:00 SAST, gold prices edged higher.  
On Friday, gold prices rose amid concerns over global economic recovery.

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**▲ 0.75%**

**Platinum (\$/oz)**

**902.7**

At 06:00 SAST, platinum prices advanced.  
On Friday, platinum prices climbed.



**Copper (\$/MT)\***

**6966.3**

Yesterday, copper prices have climbed.  
\* As of previous close

## Major South African Corporate News

### Tsogo Sun Hotels Limited

1H20 revenues decreased to ZAR0.34bn from ZAR2.08bn.

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### Hospitality Property Fund Limited

1H20 revenues declined 74.5% to ZAR85.54mn.

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## Major Global Economic News



### US

US consumer sentiment unexpectedly dropped in November.

US producer prices rose more than expected in October.



### Eurozone

Eurozone's gross domestic product grew less than initially estimated in 3Q20.

Eurozone's trade balance widened in September.



### Asia

Japan's economy grew at its fastest pace in 3Q20.













China retail rose less than expected in October.



### UK

UK's Rightmove house prices fell for the first time in four months in November.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 Japan	01:50	Gross Domestic Product Annualised (Q3) (P)	★★★	21.4%*	-28.1%	Quarterly
 UK	02:01	Rightmove House Price Index (MoM) (Nov)	★	-0.5%*	1.1%	Monthly
 UK	02:01	Rightmove House Price Index (YoY) (Nov)	★	6.3%*	5.5%	Monthly
 China	04:00	Industrial Production (YoY) (Oct)	★★	6.9%*	6.9%	Monthly
 China	04:00	Retail Sales (YoY) (Oct)	★★★	4.3%*	3.3%	Monthly
 Japan	06:30	Industrial Production (MoM) (Sep) (F)	★★★	4.0%	1.0%	Monthly
 Japan	06:30	Industrial Production (YoY) (Sep) (F)	★★★	-9.0%	-13.8%	Monthly
 Eurozone	11:00	ECB's Guindos Speech	★	-	-	As Scheduled
 Italy	11:00	Consumer Price Index (EU Norm) (YoY) (Oct) (F)	★★★	-	-1.0%	Monthly
 Switzerland	11:00	Total Sight Deposits (CHF) (13-Nov)	★	-	-	Weekly
 Switzerland	11:00	Domestic Sight Deposits (CHF) (13-Nov)	★	-	-	Weekly
 Eurozone	15:00	ECB's Lagarde Speech	★	-	-	As Scheduled

Note: ★★★ High   ★★ Medium   ★ Low

 40 best performers on the All Share Index

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Pan African Resources PLC	446	-11.68	6.19	106.48
Cartrack Holdings Ltd	4499	-5.26	11.50	91.66
Montauk Holdings Ltd	7270	-4.89	6.91	91.32
Gold Fields Ltd	16632	-16.67	-3.67	76.54
African Rainbow Minerals Ltd	23843	-1.69	4.78	59.42
Harmony Gold Mining Co Ltd	7549	-18.56	-5.34	47.44
Blue Label Telecoms Ltd	377	-2.08	6.80	46.12
Naspers Ltd	317800	-7.70	0.53	38.73
Allied Electronics Corp Ltd	3045	-5.44	15.46	34.87
Kumba Iron Ore Ltd	50792	-2.88	5.75	33.88
Northam Platinum Ltd	16028	-11.40	3.53	29.66
Omnia Holdings Ltd	4350	11.54	14.44	28.89
Zeder Investments Ltd	258	-3.01	-2.64	23.46
AngloGold Ashanti Ltd	37251	-14.23	1.00	18.35
Cie Financiere Richemont SA	12759	5.25	26.03	18.25
Royal Bafokeng Platinum Ltd	5864	-8.82	-0.07	18.18
Shoprite Holdings Ltd	14433	9.32	11.96	18.10
African Oxygen Ltd	2420	0.83	1.00	17.92
Afrimat Ltd	3800	0	0.03	17.11
Stenprop Ltd	2650	-3.00	-1.56	15.19
Vodacom Group Ltd	12793	3.58	4.41	14.54

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Sirius Real Estate Ltd	1769	12.68	14.13	12.82
Impala Platinum Holdings Ltd	15442	-9.54	8.16	12.32
Anglo American PLC	43116	10.72	14.72	11.92
Trencor Ltd	390	-1.27	-5.57	11.04
Mondi PLC	34987	5.98	14.84	10.37
PSG Group Ltd	5682	5.93	12.22	9.57
JSE Ltd	11946	1.25	9.90	8.45
Rand Merchant Investment Holdings Ltd	3272	7.17	15.37	8.31
BHP Group PLC	33552	2.05	7.45	7.86
AfroCentric Investment Corp Ltd	330	5.23	3.66	7.44
Oceana Group Ltd	6500	8.57	9.43	7.16
Exxaro Resources Ltd	12631	3.48	15.85	7.16
Cashbuild Ltd	22696	2.70	3.23	6.16
Aspen Pharmacare Holdings Ltd	12585	4.01	19.23	5.56
Discovery Ltd	12574	7.07	17.51	5.50
Reinet Investments SCA	28829	7.68	11.81	5.11
Italtile Ltd	1335	-6.64	2.30	4.64
Quilter PLC	2920	8.87	13.80	3.48
Santam Ltd	29000	5.24	18.37	3.18
JSE All Share Index	57183.0	1.41	10.64	0.17



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