



ONE Minute Brief

18 JANUARY 2021



 Economic and Political News

Eskom anticipates electricity shortages on a weekly basis for the next three months.

Eskom to resume Stage 2 load shedding from today.

Automobile Association (AA) expects petrol prices to rise by 80c per litre and diesel by 61c per litres in February.



President Cyril Ramaphosa says he will step down should he be charged with corruption.



Former President Jacob Zuma asks Supreme Court to reinstate state funding for his legal costs.



 South Africa Market ▼

South African markets closed in the green on Friday, weighed down by losses in property, resources and retail sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 63,549.75		▼ 58,446.35		▲ 11,916.89	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-335.02	-0.52	-289.60	-0.49	0.73	0.01
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	6.97	NA	7.48	NA	-1.19
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
4.06	6.97	3.83	7.48	8.08	-1.19

 US Market ▼

US markets closed weaker on Friday, ahead of bank quarterly results.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 3,768.25		▼ 12,998.50		▼ 30,814.26	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-27.29	-0.72	-114.14	-0.87	-177.26	-0.57
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	0.32	NA	0.86	NA	0.68
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.71	0.32	5.65	0.86	3.27	0.68

JSE All Share

S&P 500

 Top Gainers

Murray & Roberts Holdings Ltd	5.8%	-8.4%
Reunert Ltd	5.3%	-5.6%
Curro Holdings Ltd	3.9%	-5.2%
Clicks Group Ltd	3.3%	-4.6%
Dis-Chem Pharmacies Ltd	2.9%	-4.6%

Top Losers 

Steinhoff International Holdings NV		
Sirius Real Estate Ltd		
African Rainbow Minerals Ltd		
Redefine Properties Ltd		
EPP NV		

 Top Gainers

NiSource Inc	4.9%	-8.7%
ABIOMED Inc	3.6%	-7.8%
Akamai Technologies Inc	3.5%	-7.6%
CenterPoint Energy Inc	2.9%	-6.9%
Alliant Energy Corp	2.9%	-6.0%

Top Losers 

Enphase Energy Inc		
Wells Fargo & Co		
Occidental Petroleum Corp		
Citigroup Inc		
Concho Resources Inc		

 **UK Market** ▼

UK markets finished lower on Friday, as fresh lockdown restrictions raised concerns over the country's economic recovery.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 6,735.71		▼ 13,787.73		▼ 5,611.69	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-66.25	-0.97	-200.97	-1.44	-69.45	-1.22
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	4.26	NA	0.50	NA	1.09
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.10	4.26	3.22	0.50	0.60	1.09

 **Asia Market** ▲

Asian markets are trading mostly higher this morning. The Nikkei 225 Index is trading 0.8% lower at 28,291.55.

*As at 6:00 SAST

Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▼ 28,291.55		▲ 3,591.32		▲ 28,741.17	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-227.63	-0.80	24.95	0.70	167.31	0.59
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	3.92	NA	2.69	NA	4.93
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.82	3.92	2.40	2.69	3.38	4.93

FTSE 100

 **Top Gainers**

AVEVA Group	7.0%	-5.3%
GlaxoSmithKline Plc	1.5%	-4.9%
Pennon Group Plc	1.3%	-4.7%
Unilever Plc	0.9%	-3.7%
Persimmon Plc	0.8%	-3.7%

Top Losers 

Anglo American Plc
Just Eat Takeaway.com NV
DS Smith Plc
Antofagasta Plc
Kingfisher Plc

Nikkei 225


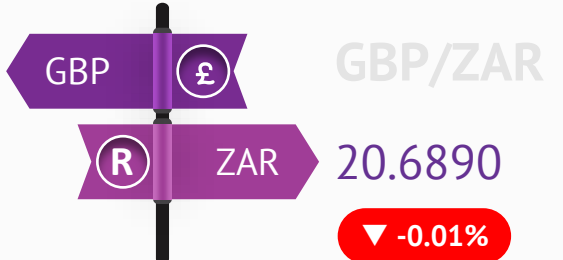


 **Top Gainers**

Denso Corp	2.4%	-6.1%
Tokyo Electric Power Co Holdings Inc	2.2%	-5.5%
CyberAgent Inc	1.8%	-4.5%
Panasonic Corp	1.6%	-4.0%
M3 Inc	1.4%	-3.9%





Top Losers 

Nikon Corp
Isetan Mitsukoshi Holdings Ltd
JGC Corp
Mitsui OSK Lines Ltd
J Front Retailing Co Ltd

 Currencies

 <p>USD/ZAR 15.2441 ▲ 0.08%</p> <p>At 06:00 SAST, the US Dollar advanced against the South African Rand. The US Dollar rose against the South African Rand on Friday, as worries over rising coronavirus cases increased demand for the safe haven asset.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 20.6890 ▼ -0.01%</p> <p>At 06:00 SAST, the British Pound is trading marginally weaker against the South African Rand. The British Pound climbed against the South African Rand on Friday.</p>	 <p>EUR/ZAR 18.4038 ▲ 0.06%</p> <p>At 06:00 SAST, the Euro rose against the South African Rand. The Euro strengthened against the South African Rand on Friday.</p>	 <p>AUD/ZAR 11.7253 ▼ -0.08%</p> <p>At 06:00 SAST, the Australian Dollar is trading lower against the South African Rand. The Australian Dollar dropped against the South African Rand on Friday.</p>
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 Commodities

 <p>▼ -0.91%</p> <p>Brent (\$/barrel) 54.60</p> <p>At 06:00 SAST, Brent crude oil declined. On Friday, Brent crude oil dropped, amid worries over fresh Covid-19 outbreak in China. Additionally, Baker Hughes reported that US oil rig count rose by 12 to 287 last week.</p> <p>To Read More Click Here</p>	 <p>▼ -0.18%</p> <p>Gold (\$/oz) 1,826.60</p> <p>At 06:00 SAST, gold prices edged lower. On Friday, gold prices fell, amid strength in the US Dollar.</p> <p>To Read More Click Here</p>	 <p>▬ 0.00%</p> <p>Platinum (\$/oz) 1,085.70</p> <p>At 06:00 SAST, platinum prices remained unchanged. On Friday, platinum prices decreased.</p>	 <p>Copper (\$/MT)* 7,937.40</p> <p>On Friday, copper prices have fallen. * As of previous close</p>
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Major South African Corporate News

Truworths International Limited

Group retail sales for the 26-weeks ended 27 December 2020 declined by 8.5%.

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Major Global Economic News



US

Advance retail sales unexpectedly fell in December.

The Michigan consumer sentiment index dropped in January.

Industrial production advanced more than anticipated in December.



Eurozone

Eurozone's trade surplus narrowed in November.



Asia

China's GDP rose less-than-expected in 4Q20.

In China, retail sales advanced less-than-anticipated in December.

China's industrial production climbed in December.














UK

UK economy contracted less than estimated in November.

The NIESR expects the economy to slow sharply in the last quarter of 2020.

Industrial production unexpectedly dropped in November.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 UK	02:01	Rightmove House Price Index (MoM) (Jan)	★	-0.90%*	-0.60%	Monthly
 UK	02:01	Rightmove House Price Index (YoY) (Jan)	★	3.30%*	6.60%	Monthly
 China	04:00	Gross Domestic Product (QoQ) (Q4)	★★★	2.60%*	2.70%	Quarterly
 China	04:00	Gross Domestic Product (YoY) (Q4)	★★★	6.50%*	4.90%	Quarterly
 China	04:00	Industrial Production (YoY) (Dec)	★★	7.30%*	7.00%	Monthly
 China	04:00	Retail Sales (YoY) (Dec)	★★★	4.60%*	5.00%	Monthly
 Japan	06:30	Capacity Utilisation (MoM) (Nov)	★	-2.90%*	6.00%	Monthly
 Japan	06:30	Industrial Production (MoM) (Nov) (F)	★★★	-0.50%*	4.00%	Monthly
 Japan	06:30	Industrial Production (YoY) (Nov) (F)	★★★	-3.90%*	-3.00%	Monthly
 Italy	11:00	Consumer Price Index (EU Norm) (YoY) (Dec) (F)	★★★	-0.30%	-0.30%	Monthly
 Canada	15:15	Housing Starts s.a. (Dec)	★★★	-	246.00K	Monthly

Note: ★★★ High ★★ Medium ★ Low

 40 best performers on the All Share Index

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Texton Property Fund Ltd	198	13.14	37.50	37.50
ArcelorMittal South Africa Ltd	135	9.76	35.00	35.00
Montauk Holdings Ltd	13567	19.01	33.77	33.77
Sappi Ltd	4184	7.47	27.48	27.48
Sasol Ltd	16990	0.93	26.86	26.86
Glencore PLC	5824	2.32	24.36	24.36
Long4Life Ltd	398	11.48	20.97	20.97
KAP Industrial Holdings Ltd	377	8.02	19.30	19.30
MiX Telematics Ltd	835	4.37	19.29	19.29
Murray & Roberts Holdings Ltd	920	9.52	15.43	15.43
Aspen Pharmacare Holdings Ltd	14449	4.25	15.25	15.25
City Lodge Hotels Ltd	287	0.70	14.80	14.80
Anglo American PLC	55547	-4.59	14.53	14.53
BHP Group PLC	44420	-2.62	14.17	14.17
AfroCentric Investment Corp Ltd	430	-6.52	13.16	13.16
EOH Holdings Ltd	930	6.29	12.05	12.05
Royal Bafokeng Platinum Ltd	7304	2.15	11.72	11.72
Naspers Ltd	336492	9.60	11.45	11.45
Accelerate Property Fund Ltd	70	-2.78	11.11	11.11
Mpact Ltd	1533	11.82	10.69	10.69
Exxaro Resources Ltd	15350	-2.61	10.51	10.51

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Net 1 UEPS Technologies Inc	7500	4.17	10.29	10.29
Lewis Group Ltd	2465	2.79	10.29	10.29
African Rainbow Minerals Ltd	28865	0.05	10.21	10.21
Investec PLC	4139	0.27	9.93	9.93
Investec Ltd	4020	1.13	9.72	9.72
Clicks Group Ltd	27609	5.21	9.27	9.27
Mondi PLC	37482	-3.43	9.24	9.24
DataTec Ltd	2680	1.02	9.16	9.16
Reunert Ltd	3950	3.00	9.12	9.12
South32 Ltd	3069	-1.00	8.91	8.91
Life Healthcare Group Holdings Ltd	1819	4.96	8.15	8.15
Cie Financiere Richemont SA	14139	-1.46	7.85	7.85
Santam Ltd	27450	4.00	7.74	7.74
MTN Group Ltd	6457	-4.97	7.28	7.28
Impala Platinum Holdings Ltd	21509	4.19	6.53	6.53
PPC Ltd	147	1.38	6.52	6.52
Super Group Ltd/South Africa	2486	0.12	6.19	6.19
Mediclinic International PLC	6040	0.53	6.08	6.08
Emira Property Fund Ltd	705	7.80	5.86	5.86
JSE All Share Index	63550.0	0.05	6.97	6.97

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