



ONE Minute Brief

15 FEBRUARY 2021

 Economic and Political News

South Africa (SA) is close to picking equity partners for South African Airways, says Public Enterprise Minister Pravin Gordhan.

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African National Congress secretary-general Ace Magashule faces pressure to step down.

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SA to reopen 20 land border crossing points next week.

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SA banks provide funding for Beitbridge border revamp.

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Farmers to contest new national minimum wage.

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 **South Africa Market** ▲

South African markets closed in the green on Friday, boosted by gains in banking and financial sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 66,132.24		▲ 60,673.94		▲ 12,746.53	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
249.52	0.38	253.49	0.42	287.41	2.31
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	5.86	NA	5.87	NA	9.05
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
5.16	11.32	5.39	11.57	-3.08	5.69

 **US Market** ▲

US markets closed firmer on Friday, led by gains in energy, financial and materials sector stocks.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 3,934.83		▲ 14,095.47		▲ 31,458.40	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
18.45	0.47	69.70	0.50	27.70	0.09
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	5.94	NA	7.84	NA	4.92
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-1.11	4.76	1.42	9.37	-2.04	2.78

JSE All Share

S&P 500

 **Top Gainers**

Steinhoff International Holdings NV	6.2%	-5.8%
MTN Group Ltd	5.3%	-5.3%
Absa Group Ltd	5.3%	-5.1%
Nedbank Group Ltd	5.2%	-3.4%
Investec Ltd	4.0%	-3.2%

Top Losers 

EPP NV		
Harmony Gold Mining Co Ltd		
Tsogo Sun Hotels Ltd		
DRDGOLD Ltd		
Pan African Resources Plc		

 **Top Gainers**

Illumina Inc	11.9%	-7.4%
Mohawk Industries Inc	6.0%	-7.1%
Teradyne Inc	5.5%	-3.3%
Mosaic Co	5.1%	-2.7%
Discovery Inc	4.9%	-2.4%

Top Losers 

DaVita Inc		
Newell Brands Inc		
Digital Realty Trust Inc		
Under Armour Inc		
Ralph Lauren Corp		

 **UK Market** ▲

UK markets finished higher on Friday, buoyed by gains in healthcare sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 6,589.79		▲ 14,049.89		▲ 5,703.67	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
61.07	0.94	8.98	0.06	33.85	0.60
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	2.85	NA	4.59	NA	5.64
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.82	2.00	-2.08	2.41	-2.74	2.74

 **Asia Market** ▲

Asian markets are trading higher this morning, as rollout of Covid-19 vaccines revived hopes for a global economic recovery. The Nikkei 225 Index is trading 1.3% higher at 29,894.27.

*As at 6:00 SAST; #As on 10 February 2021; **As on 11 February 2021

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Nikkei 225 * (JPY)		Shanghai Composite# (CNY)		Hang Seng** (HKD)	
▲ 29,894.27		▲ 3,655.09		▲ 30,173.57	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
374.20	1.27	+51.60	+1.43	+134.85	+0.45
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	6.71	NA	4.94	NA	6.68
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.80	7.56	0.29	5.24	3.87	10.81

FTSE 100

 **Top Gainers**

St James's Place Plc	3.9%	-2.2%
AstraZeneca Plc	3.1%	-1.9%
DCC Plc	3.1%	-1.6%
Prudential Plc	3.0%	-1.2%
Hikma Pharmaceuticals Plc	2.8%	-1.0%

Top Losers 

Kingfisher Plc	
SSE Plc	
Tesco Plc	
Whitbread Plc	
JD Sports Fashion Plc	

Nikkei 225



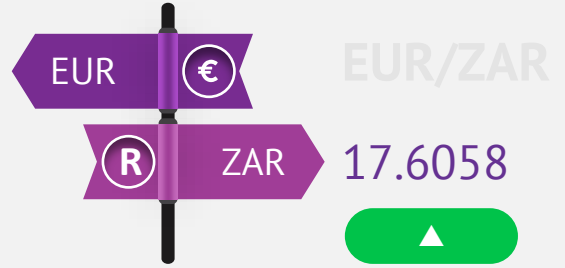

 **Top Gainers**

Ebara Corp	13.1%	-6.7%
Olympus Corp	11.7%	-6.5%
Inpex Corp	5.1%	-3.3%
Hino Motors Ltd	4.3%	-3.0%
JGC Corp	4.2%	-3.0%





Top Losers 

Toho Zinc Co Ltd
Rakuten Inc
Subaru Corp
Mitsui E&S Holdings Co Ltd
Sompo Holdings Inc

 Currencies

 <p>USD/ZAR 14.5085</p> <p>▲</p> <p>At 06:00 SAST, the US Dollar retreated 0.27% against the South African Rand. The US Dollar fell against the South African Rand on Friday.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 20.1659</p> <p>▼</p> <p>At 06:00 SAST, the British Pound is trading marginally higher against the South African Rand. The British Pound declined against the South African Rand on Friday, after UK's economy slumped in 2020.</p> <p>To Read More Click Here</p>	 <p>EUR/ZAR 17.6058</p> <p>▲</p> <p>At 06:00 SAST, the Euro fell 0.12% against the South African Rand. The Euro weakened against the South African Rand on Friday.</p> <p>To Read More Click Here</p>	 <p>AUD/ZAR 11.2940</p> <p>▼</p> <p>At 06:00 SAST, the Australian Dollar is trading slightly firmer against the South African Rand. The Australian Dollar dropped against the South African Rand on Friday.</p> <p>To Read More Click Here</p>
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 Commodities

 <p>▲ 1.87%</p> <p>Brent (\$/barrel) 63.60</p> <p>At 06:00 SAST, Brent crude oil rose, amid tensions in the Middle East. On Friday, Brent crude oil climbed, amid hopes for a fresh stimulus from the US government. Meanwhile, Baker Hughes reported that US oil rig count rose by 7 to 306 last week.</p> <p>To Read More Click Here</p>	 <p>▲ 0.25%</p> <p>Gold (\$/oz) 1,826.10</p> <p>At 06:00 SAST, gold prices edged higher. On Friday, gold prices fell, amid strength in the US Dollar.</p> <p>To Read More Click Here</p>	 <p>▲ 2.88%</p> <p>Platinum (\$/oz) 1,295.30</p> <p>At 06:00 SAST, platinum prices gained. On Friday, platinum prices advanced.</p> <p>To Read More Click Here</p>	 <p>Copper (\$/MT)* 8,352.25</p> <p>On Friday, copper prices have risen. * As of previous close</p> <p>To Read More Click Here</p>
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 Major South African Corporate News

No News

 Major Global Economic News



US

The Michigan consumer sentiment index unexpectedly fell to six-month low in February.



Asia

Japan's GDP grew for a second consecutive quarter in 4Q20.



UK

The Rightmove house price index advanced in February.

GDP grew more than expected in 4Q20.

Total trade deficit narrowed in December.

The NIESR GDP estimate eased in January.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 UK	02:01	Rightmove House Price Index (MoM) (Feb)	★	0.50%*	-0.90%	Monthly
 UK	02:01	Rightmove House Price Index (YoY) (Feb)	★	3.00%*	3.30%	Monthly
 Japan	06:30	Capacity Utilisation (MoM) (Dec)	★	-	-2.90%	Monthly
 Japan	06:30	Industrial Production (MoM) (Dec) (F)	★★★	-	-0.50%	Monthly
 Japan	06:30	Industrial Production (YoY) (Dec) (F)	★★★	-	-3.90%	Monthly
 Switzerland	11:00	Total Sight Deposits (CHF) (12-Feb)	★	-	CHF704300.00mn	Weekly
 Switzerland	11:00	Domestic Sight Deposits (CHF) (12-Feb)	★	-	CHF640200.00mn	Weekly
 Eurozone	12:00	Industrial Production s.a. (MoM) (Dec)	★★★	-	2.50%	Monthly
 Eurozone	12:00	Industrial Production w.d.a. (YoY) (Dec)	★★★	-	-0.60%	Monthly
 Eurozone	12:00	Trade Balance n.s.a. (Dec)	★★	-	EUR25.80bn	Monthly
 Eurozone	12:00	Trade Balance s.a. (Dec)	★★★	-	EUR25.10bn	Monthly
 Canada	15:30	Manufacturing Sales (MoM) (Dec)	★★	-	-0.60%	Monthly

Note: ★★★ High ★★ Medium ★ Low

 40 best performers on the All Share Index

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
ArcelorMittal South Africa Ltd	282	47.64	75.16	182.00
Steinhoff International Holdings NV	223	14.36	8.25	114.42
Nampak Ltd	306	14.18	50.00	53.00
Montauk Holdings Ltd	15503	0.00	0.00	52.86
Sasol Ltd	20024	2.55	21.36	49.51
Texton Property Fund Ltd	209	7.73	15.47	45.14
City Lodge Hotels Ltd	355	14.89	21.58	42.00
Telkom SA SOC Ltd	4235	14.65	25.74	37.90
Imperial Logistics Ltd	5150	6.78	21.18	37.88
Truworths International Ltd	4948	2.23	10.84	34.27
KAP Industrial Holdings Ltd	420	1.94	14.44	32.91
PPC Ltd	183	7.02	15.09	32.61
Blue Label Telecoms Ltd	509	5.17	11.14	31.87
Accelerate Property Fund Ltd	83	10.67	18.57	31.75
Reunert Ltd	4514	2.59	18.17	30.82
Sun International Ltd/South Africa	1605	1.90	22.52	29.64
Mpact Ltd	1790	9.15	6.80	29.24
Redefine Properties Ltd	430	18.78	28.74	29.13
Raubex Group Ltd	2735	3.48	8.10	27.21
Hudaco Industries Ltd	10300	4.04	11.35	27.16
Royal Bafokeng Platinum Ltd	8295	6.73	20.60	26.87

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Sappi Ltd	4160	-5.82	-2.67	26.75
Cashbuild Ltd	29635	4.30	3.98	25.04
Lewis Group Ltd	2639	0.73	-2.26	25.00
Exxaro Resources Ltd	17292	11.56	14.52	24.49
MTN Group Ltd	7446	6.55	18.95	23.71
Hyprop Investments Ltd	3147	14.85	26.79	23.43
Naspers Ltd	371100	4.00	6.70	22.91
Distell Group Holdings Ltd	11500	-1.16	23.90	21.00
MiX Telematics Ltd	847	1.32	3.29	21.00
Allied Electronics Corp Ltd	1315	13.46	11.82	20.53
Old Mutual Ltd	1428	-3.58	10.02	20.10
AfroCentric Investment Corp Ltd	456	-4.20	-4.20	20.00
Motus Holdings Ltd	6691	-5.76	8.67	19.48
Italtile Ltd	1765	-0.56	10.31	19.26
Tsogo Sun Holdings Ltd	608	3.05	21.36	19.22
Stadio Holdings Ltd	232	2.20	20.21	18.97
Woolworths Holdings Ltd/South Africa	4693	2.47	4.45	18.69
Coronation Fund Managers Ltd	5117	-2.27	4.64	18.53
Long4Life Ltd	389	-2.75	-7.82	18.24
JSE All Share Index	66132.0	2.87	5.86	11.32

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