



ONE Minute Brief

12 FEBRUARY 2021

 Economic and Political News

South Africa's (SA) manufacturing and mining production contracts by more than 10% in 2020.

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President Cyril Ramaphosa extends special Covid-19 grant and Ters benefits.

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SA extends national state of disaster to 15 March.

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Department of Mineral Resources and Energy will soon announce successful bids for 2000MW of emergency power.

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SA aims to immunise between 350,000 and 500,000 health workers with Johnson & Johnson's Covid-19 vaccine.

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 South Africa Market ▼

South African markets closed in the red yesterday, led by losses in mining sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 65,882.72		▼ 60,420.45		▲ 12,459.12	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-268.10	-0.41	-217.25	-0.36	38.46	0.31
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
2.48	5.46	2.62	5.42	-1.03	6.59
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
5.16	10.90	5.39	11.11	-3.08	3.31

 US Market ▲

US markets closed mostly firmer yesterday, amid hopes for additional fiscal stimulus from the US government.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 3,916.38		▲ 14,025.77		▼ 31,430.70	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
6.50	0.17	53.24	0.38	-7.10	-0.02
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.76	5.44	1.22	7.31	0.91	4.83
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-1.11	4.27	1.42	8.83	-2.04	2.69

JSE All Share

S&P 500

 Top Gainers

Liberty Two Degrees	8.5%	-6.5%
Allied Electronics Corp Ltd	6.5%	-5.5%
RMB Holdings Ltd	4.8%	-4.7%
Metair Investments Ltd	3.5%	-4.3%
Emira Property Fund Ltd	3.5%	-4.3%

Top Losers 

KAP Industrial Holdings Ltd
Vukile Property Fund Ltd
City Lodge Hotels Ltd
Brait SE
Hammerson Plc

 Top Gainers

Zebra Technologies Corp	10.0%	-9.2%
KLA Corp	9.0%	-7.9%
Lam Research Corp	7.5%	-5.9%
Applied Materials Inc	6.7%	-5.7%
Western Digital Corp	5.9%	-5.1%

Top Losers 

Molson Coors Brewing Co
Lumen Technologies Inc
Pool Corp
Tyson Foods Inc
AutoZone Inc

 **UK Market** ▲

UK markets finished higher yesterday, following upbeat quarterly earnings report from Covid-19 vaccine maker AstraZeneca.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 6,528.72		▲ 14,040.91		▼ 5,669.82	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
4.36	0.07	107.94	0.77	-0.98	-0.02
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.61	1.89	-0.11	4.53	0.19	5.01
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.82	1.06	-2.08	2.35	-2.74	2.13

 **Asia Market** ▼

Asian markets are trading lower this morning. The Nikkei 225 Index is trading 0.4% lower at 29,453.04.

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

Nikkei 225* (JPY)		Shanghai Composite# (CNY)		Hang Seng# (HKD)	
▼ 29,453.04		▲ 3,655.09		▲ 30,173.57	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-109.89	-0.37	+51.60	+1.43	+134.85	+0.45
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
2.72	6.87	4.54	4.94	3.02	6.68
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.80	7.72	0.29	5.24	3.87	10.81

FTSE 100

 **Top Gainers**

Coca-Cola HBC AG	4.7%	-2.3%
Intertek Group Plc	3.7%	-2.2%
Avast Plc	3.2%	-2.1%
DS Smith Plc	3.1%	-1.8%
Burberry Group Plc	3.0%	-1.7%

Top Losers 

Royal Dutch Shell Plc- Class A
Land Securities Group Plc
Royal Dutch Shell Plc- Class B
Anglo American Plc
Natwest Group Plc

Nikkei 225


 **Top Gainers**


Citizen Watch Co Ltd	5.4%	-5.2%
Subaru Corp	3.9%	-5.2%
Ricoh Co Ltd	3.7%	-5.0%
SUMCO Corp	3.5%	-5.0%
DeNA Co Ltd	3.5%	-4.5%


Top Losers 

Kawasaki Kisen Kaisha Ltd
Mitsui OSK Lines Ltd
OKUMA Corp
Yokogawa Electric Corp
Nippon Yusen KK

 Currencies


USD  **USD/ZAR**


ZAR  **14.6316**




At 06:00 SAST, the US Dollar advanced marginally against the South African Rand.
The US Dollar fell against the South African Rand yesterday, amid weaker than expected US jobs data.


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GBP  **GBP/ZAR**


ZAR  **20.1797**




At 06:00 SAST, the British Pound is trading 0.17% weaker against the South African Rand.
The British Pound declined against the South African Rand yesterday.


EUR  **EUR/ZAR**


ZAR  **17.7359**



At 06:00 SAST, the Euro fell 0.05% against the South African Rand.
The Euro weakened against the South African Rand yesterday.


AUD  **AUD/ZAR**

ZAR  **11.3283**




At 06:00 SAST, the Australian Dollar is trading lower 0.12% against the South African Rand.
The Australian Dollar dropped against the South African Rand yesterday.

 Commodities

 **-0.65%**


Brent (\$/barrel)

60.74




At 06:00 SAST, Brent crude oil declined.
Yesterday, Brent crude oil dropped, as the OPEC and the International Energy Agency (IEA) raised concerns over demand recovery.

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 **-0.14%**


Gold (\$/oz)

1,822.40




At 06:00 SAST, gold prices edged lower.
Yesterday, gold prices fell, amid rise in the US Treasury yields.

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 **-1.38%**


Platinum (\$/oz)

1,229.80




At 06:00 SAST, platinum prices declined.
Yesterday, platinum prices advanced, amid hopes that economic recovery would boost demand from the auto sector.

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

8,289.25



Yesterday, copper prices have fallen.
* As of previous close

Major South African Corporate News

ArcelorMittal SA Ltd

FY20 revenues fell 40% to ZAR24.64bn from ZAR41.35bn posted in the previous year.

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Major Global Economic News



US













Initial jobless claims fell less than expected in the week ended 05 February 2021.



Eurozone

Germany's wholesale price index climbed in January.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus	Previous	Frequency
 UK	09:00	Index of Services (MoM) (Dec)	★	-	-3.40%	Monthly
 UK	09:00	Industrial Production (MoM) (Dec)	★	-	-0.10%	Monthly
 UK	09:00	Manufacturing Production (MoM) (Dec)	★	0.60%	0.70%	Monthly
 UK	09:00	Construction Output s.a. (MoM) (Dec)	★	-	1.90%	Monthly
 UK	09:00	Total Trade Balance (Dec)	★	-	-GBP5.00bn	Monthly
 UK	09:00	Gross Domestic Product s.a. (QoQ) (Q4) (P)	★	0.50%	16.00%	Quarterly
 Switzerland	09:30	Consumer Price Index (YoY) (Jan)	★★	-0.60%	-0.80%	Monthly
 Spain	10:00	Consumer Price Index (YoY) (Jan) (F)	★★★	0.60%	-0.50%	Monthly
 Eurozone	12:00	Industrial Production s.a. (MoM) (Dec)	★★★	-	2.50%	Monthly
 UK	16:00	NIESR GDP Estimate (3M) (Jan)	★	-	0.90%	Monthly
 US	17:00	Reuters/Michigan Consumer Sentiment Index (Feb) (P)	★★★	80.80	79.00	Monthly
 US	20:00	Baker Hughes US Oil Rig Count (12-Feb)	★	-	299.00	Weekly

Note: ★★★ High ★★ Medium ★ Low

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<p>a GTC, The Wanderers Office Park, 52 Corlett Drive, Illovo, 2196</p>	<p>t +27 (0) 10 597 6800 f +27 (0) 10 597 6801</p>	<p>GTC (Pty) Ltd. reg. no. 1996/001488/07</p>	<p>An Authorised Financial Services Provider</p>
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