



# ONE Minute Brief

22 FEBRUARY 2021



 Economic and Political News

**Former President Jacob Zuma criticises the country’s laws for being too lenient on hardened criminals, labelling legislation as “soft”.**

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**EFF threatens court action if the country’s “political space” is not reopened.**

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**Banks, PIC push to solve ZAR464bn Eskom debt crisis.**

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**African National Congress Secretary-General Ace Magashule charged with 74 crimes.**

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**Private sector health workers get one-third of first batch of 80,000 Johnson & Johnson (J&J) vaccines.**

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 **South Africa Market** ▲

South African markets closed in the green on Friday, on stimulus hopes and progress in the Covid-19 vaccine rollouts.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 67,464.86		▲ 62,105.24		▲ 12,369.15	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
889.41	1.34	898.66	1.47	13.44	0.11
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	7.99	NA	8.36	NA	5.82
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
5.16	13.56	5.39	14.21	-3.08	2.56

 **US Market** ▲

US markets closed mostly firmer on Friday, buoyed by gains in cyclical sector stocks.

S&P 500 futures ▼

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 3,906.71		▲ 13,874.46		▲ 31,494.32	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-7.26	-0.19	9.10	0.07	0.98	0.00
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	5.18	NA	6.15	NA	5.04
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-1.11	4.01	1.42	7.65	-2.04	2.90

**JSE All Share**

**S&P 500**

 **Top Gainers**

Textainer Group Holdings Ltd	12.9%	-5.0%
Liberty Two Degrees	12.8%	-5.0%
Steinhoff International Holdings NV	6.2%	-4.8%
Bytes Technology Group Plc	5.9%	-4.8%
Curro Holdings Ltd	5.4%	-4.7%

**Top Losers** 

Montauk Renewables Inc
Allied Electronics Corp Ltd
Tsogo Sun Gaming Ltd
Imperial Logistics Ltd
Cartrack Holdings Ltd

 **Top Gainers**

Albemarle Corp	10.4%	-8.1%
Deere & Co	9.9%	-5.1%
HollyFrontier Corp	9.8%	-4.7%
Freeport-McMoRan Inc	9.8%	-4.1%
Carnival Corp	7.4%	-4.0%

**Top Losers** 

Hologic Inc
West Pharmaceutical Services Inc
Zoetis Inc
PerkinElmer Inc
Keysight Technologies Inc

 UK Market ▲

UK markets finished higher on Friday, amid hopes for a smooth economic recovery.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 6,624.02		▲ 13,993.23		▲ 5,773.55	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
6.87	0.10	106.30	0.77	45.22	0.79
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	3.38	NA	4.17	NA	6.93
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.82	2.53	-2.08	2.00	-2.74	4.00

 Asia Market ▲

Asian markets are trading mostly higher this morning. The Nikkei 225 Index is trading 0.5% higher at 30,155.42.

\*As at 6:00 SAST

Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▲ 30,155.42		▼ 3,693.88		▲ 30,769.23	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
137.50	0.46	-2.29	-0.06	124.50	0.41
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	8.51	NA	6.12	NA	8.35
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.80	9.38	0.29	6.42	3.87	12.54

FTSE 100

 Top Gainers

Antofagasta Plc	7.2%	-3.5%
Rolls-Royce Holdings Plc	5.7%	-3.3%
Natwest Group Plc	5.2%	-3.2%
Intl Consolidated Airlines Grp	5.1%	-3.1%
Evraz Plc	4.6%	-2.6%

 Top Losers

Experian Plc		
Reckitt Benckiser Group Plc		
Intertek Group Plc		
AstraZeneca Plc		
RELX Plc		

Nikkei 225





 Top Gainers

Yokohama Rubber Co Ltd	7.2%	-4.0%
Pacific Metals Co Ltd	6.9%	-3.7%
Fujikura Ltd	5.8%	-3.4%
ANA Holdings Inc	5.8%	-3.1%
Shinsei Bank Ltd	5.7%	-2.4%





 Top Losers

Olympus Corp		
Konica Minolta Inc		
Terumo Corp		
Daikin Industries Ltd		
Kyowa Hakko Kirin Co Ltd		

 Currencies

 <p><b>USD/ZAR</b> 14.7195</p> <p>At 06:00 SAST, the US Dollar advanced 0.17% against the South African Rand. The US Dollar rose against the South African Rand on Friday.</p>	 <p><b>GBP/ZAR</b> 20.6369</p> <p>At 06:00 SAST, the British Pound is trading 0.22% higher against the South African Rand. The British Pound climbed against the South African Rand on Friday.</p>	 <p><b>EUR/ZAR</b> 17.8423</p> <p>At 06:00 SAST, the Euro rose 0.14% against the South African Rand. The Euro strengthened against the South African Rand on Friday.</p>	 <p><b>AUD/ZAR</b> 11.5973</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.28% firmer against the South African Rand. The Australian Dollar advanced against the South African Rand on Friday.</p>
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 Commodities

 <p><b>Brent (\$/barrel)</b> 63.60</p> <p>▲ 1.10%</p> <p>At 06:00 SAST, Brent crude oil rose. On Friday, Brent crude oil dropped, as energy companies in Texas plan to restart oil and gas fields. Baker Hughes reported that US oil rig count fell by 1 to 305 last week.</p> <p>To Read More <a href="#">Click Here</a></p>	 <p><b>Gold (\$/oz)</b> 1,780.90</p> <p>▲ 0.29%</p> <p>At 06:00 SAST, gold prices edged higher. On Friday, gold prices rose, amid weakness in the US Dollar.</p> <p>To Read More <a href="#">Click Here</a></p>	 <p><b>Platinum (\$/oz)</b> 1,292.60</p> <p>▼ -0.04%</p> <p>At 06:00 SAST, platinum prices declined. On Friday, platinum prices advanced.</p>	 <p><b>Copper (\$/MT)*</b> 8,946.75</p> <p>On Friday, copper prices have risen. * As of previous close</p>
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## Major South African Corporate News

### Harmony Gold Mining Co. Ltd

Expects 1H21 HEPS to be between 761.00c and 795.00c in 1H21.

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### Santam Limited

Expects HEPS in FY20 to be between ZAR9.97 and AZR12.03 compared with ZAR20.69.

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### Truworths International Limited

Appointed Mr. Hermanus Gideon Smit, as acting CFO with effect from 1 March 2021.

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## Major Global Economic News



### US

Existing home sales unexpectedly climbed in January.

The Markit services PMI unexpectedly rose in February.

The Markit manufacturing PMI fell in line with expectations in February.



### Eurozone

Eurozone's current account surplus widened in December.

Eurozone's Markit manufacturing PMI unexpectedly rose to a 36-month high in February.

Germany's producer price index (PPI) rose more than expected in January.



### Asia

Japan's corporate service price index dropped in January.



### UK

Public sector net borrowing advanced in January.

The Markit manufacturing PMI unexpectedly advanced in February.

Retail sales dropped more than anticipated in January.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus	Previous	Frequency
 Germany	11:00	IFO - Business Climate (Feb)	★★★	90.10	90.10	Monthly
 Germany	11:00	IFO - Current Assessment (Feb)	★★	88.70	89.20	Monthly
 Germany	11:00	IFO - Expectations (Feb)	★★	91.70	91.10	Monthly
 Switzerland	11:00	Total Sight Deposits (CHF) (21-Feb)	★	-	CHF704300.00mn	Weekly
 Switzerland	11:00	Domestic Sight Deposits (CHF) (21-Feb)	★	-	CHF643100.00mn	Weekly
 US	15:30	Chicago Fed National Activity Index (Jan)	★★★	-	0.52	Monthly
 Eurozone	15:45	ECB's Lagarde Speech	★	-	-	As Scheduled
 US	17:00	Leading Indicator (MoM) (Jan)	★★★	0.30%	0.30%	Monthly
 US	17:30	Dallas Fed Manufacturing Business Index (Feb)	★★★	-	7.00	Monthly
 US	22:30	Fed's Bowman 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
ArcelorMittal South Africa Ltd	279	-1.06	73.29	179.00
Steinhoff International Holdings NV	205	-8.07	-0.49	97.12
Nampak Ltd	325	6.21	59.31	62.50
Sasol Ltd	20296	1.36	23.01	51.54
Texton Property Fund Ltd	208	-0.48	14.92	44.44
Cashbuild Ltd	33432	12.81	17.31	41.06
City Lodge Hotels Ltd	348	-1.97	19.18	39.20
PPC Ltd	192	4.92	20.75	39.13
Reunert Ltd	4787	6.05	25.31	38.73
Blue Label Telecoms Ltd	518	1.77	13.10	34.20
Royal Bafokeng Platinum Ltd	8750	5.49	27.22	33.83
Telkom SA SOC Ltd	4103	-3.12	21.82	33.60
Glencore PLC	6160	14.22	19.33	31.54
Mpact Ltd	1816	1.45	8.35	31.12
KAP Industrial Holdings Ltd	407	-3.10	10.90	28.80
Exxaro Resources Ltd	17845	3.20	18.18	28.47
Sun International Ltd/South Africa	1589	-1.00	21.30	28.35
Advtech Ltd	1219	8.74	21.54	28.32
Sappi Ltd	4211	1.23	-1.47	28.31
Naspers Ltd	383486	3.34	10.26	27.01
Truworths International Ltd	4676	-5.50	4.75	26.89

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Hudaco Industries Ltd	9852	-0.38	10.92	26.67
Cartrack Holdings Ltd	6100	6.98	-19.12	24.49
Motus Holdings Ltd	6965	4.10	13.12	24.37
Tsogo Sun Holdings Ltd	633	4.11	26.35	24.12
MiX Telematics Ltd	860	2.02	5.38	23.44
Lewis Group Ltd	2587	-1.97	-4.19	22.54
Anglo American Platinum Ltd	175239	5.04	15.46	21.43
Anglo American PLC	58716	10.13	17.31	21.06
MTN Group Ltd	7270	-2.36	16.13	20.78
BHP Group PLC	46833	9.80	12.31	20.37
Distell Group Holdings Ltd	11438	-0.54	23.23	20.35
Redefine Properties Ltd	400	-6.98	19.76	20.12
Hosken Consolidated Investments Ltd	6599	7.63	20.75	19.98
Imperial Logistics Ltd	4475	-13.11	5.29	19.81
Impala Platinum Holdings Ltd	24125	7.13	16.44	19.49
Capital & Counties Properties PLC	3406	5.88	18.10	19.26
Raubex Group Ltd	2550	-6.76	0.79	18.60
Massmart Holdings Ltd	4960	9.61	22.99	18.04
Accelerate Property Fund Ltd	74	-10.84	5.71	17.46
JSE All Share Index	67465.0	2.02	7.99	13.56



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