

ONE Minute Brief

19 APRIL 2021

 Economic and Political News

South African Health Products Regulatory Authority (Sahpra) recommends lifting the ban on Johnson & Johnson's Covid-19 vaccine.

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Eskom's two biggest labour unions demand 15% wage increases.

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Public Servants Association threatens industrial action over 0% offer.

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Tourism Equity Fund is unlawful, Solidarity and AfriForum argue.

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SA's business groups to help vaccinate 160,000 a day.

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South Africa Market ▲

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

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 68,698.78		▲ 62,898.13		▲ 12,445.57	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
875.69	1.29	818.11	1.32	103.98	0.84
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	3.33	NA	3.31	NA	1.45
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.53	15.64	0.21	15.66	0.56	3.19

US Market ▲

US markets closed firmer on Friday, following positive US economic data and upbeat quarterly earnings reports.

S&P 500 futures ▼

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,185.47		▲ 14,052.34		▲ 34,200.67	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
15.05	0.36	13.58	0.10	164.68	0.48
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	5.35	NA	6.08	NA	3.70
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
4.24	11.43	0.41	9.03	6.62	11.74

JSE All Share

Top Gainers

Sirius Real Estate Ltd	5.2%	-6.7%
Harmony Gold Mining Co Ltd	4.5%	-5.2%
Gold Fields Ltd	4.3%	-3.7%
Pan African Resources Plc	4.2%	-3.7%
Hudaco Industries Ltd	4.1%	-3.5%

Top Losers

Sun International Ltd	
Metair Investments Ltd	
Tsogo Sun Gaming Ltd	
Blue Label Telecoms Ltd	
Brait SE	

Top Gainers

PPG Industries Inc	8.7%	-7.0%
Alexion Pharmaceuticals Inc	3.9%	-4.0%
Sherwin-Williams Co	3.8%	-3.2%
Wells Fargo & Co	3.8%	-2.9%
DR Horton Inc	3.6%	-2.8%

Top Losers

State Street Corp	
Bank of New York Mellon Corp	
EOG Resources Inc	
Marathon Oil Corp	
Morgan Stanley	



UK Market ▲

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

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,019.53		▲ 15,459.75		▲ 6,287.07	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
36.03	0.52	204.42	1.34	52.93	0.85
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	4.56	NA	3.01	NA	3.62
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.55	8.65	8.86	12.69	6.38	13.25



Asia Market ▲

Asian markets are trading higher this morning, amid expectations of accommodative stance from global central banks. The Nikkei 225 Index is trading 0.4% higher at 29,798.63.

*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 29,798.63		▲ 3,471.17		▲ 29,221.76	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
115.26	0.39	44.55	1.30	252.05	0.87
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	1.73	NA	-0.44	NA	2.08
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.73	8.16	-1.91	-1.34	-2.08	6.38

FTSE 100



Top Gainers

Evraz Plc	3.7%	-2.5%
Tesco Plc	3.3%	-2.3%
Next Plc	2.8%	-1.7%
British American Tobacco Plc	2.8%	-1.6%
Natwest Group Plc	2.7%	-1.4%

Top Losers

London Stock Exchange Group Plc
Rolls-Royce Holdings Plc
Hikma Pharmaceuticals Plc
Intermediate Capital Group Plc
Barratt Developments Plc

Nikkei 225



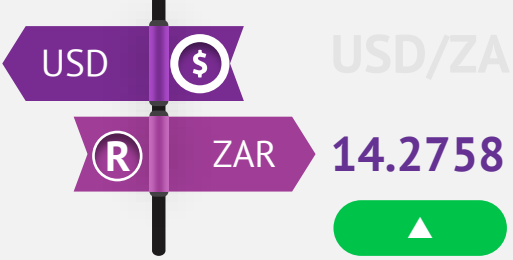
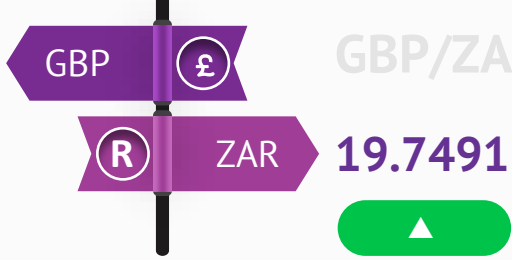
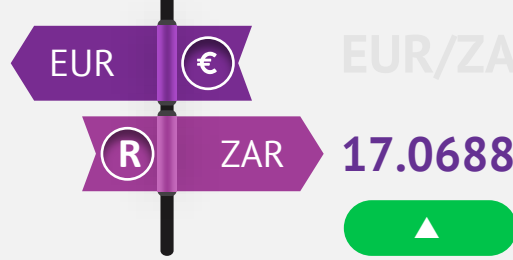
Top Gainers

SUMCO Corp	5.2%	-3.0%
Mitsui OSK Lines Ltd	3.0%	-2.4%
Seiko Epson Corp	3.0%	-2.0%
Kawasaki Kisen Kaisha Ltd	2.4%	-2.0%
Alps Alpine Co Ltd	2.3%	-1.9%

Top Losers

Ebara Corp
Shiseido Co Ltd
Keisei Electric Railway Co Ltd
Japan Exchange Group Inc
Toho Co Ltd

Currencies

 At 06:00 SAST, the US Dollar retreated 0.24% against the South African Rand. The US Dollar rose against the South African Rand on Friday.	 At 06:00 SAST, the British Pound is trading 0.32% weaker against the South African Rand. The British Pound climbed against the South African Rand on Friday, amid optimism surrounding Britain's re-opening.	 At 06:00 SAST, the Euro fell 0.49% against the South African Rand. The Euro strengthened against the South African Rand on Friday.	 At 06:00 SAST, the Australian Dollar is trading 0.31% lower against the South African Rand. The Australian Dollar gained against the South African Rand on Friday.
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Commodities

 ▼ -0.48% Brent (\$/barrel) 66.45 At 06:00 SAST, Brent crude oil declined. On Friday, Brent crude oil dropped, as Baker Hughes reported that US oil rig count rose by 7 to 344 last week.	 ▼ -0.06% Gold (\$/oz) 1,777.90 At 06:00 SAST, gold prices edged lower. On Friday, gold prices rose, amid drop in the US Treasury yields.	 ▬ 0.00% Platinum (\$/oz) 1,206.20 At 06:00 SAST, platinum prices remained unchanged. On Friday, platinum prices advanced.	 Copper (\$/MT)* 9,227.00 On Friday, copper prices have fallen. * As of previous close
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Major South African Corporate News

No News

Major Global Economic News



US

Building permits rebounded in March.
Housing starts rose to its highest level since June 2006 in March.
The Michigan consumer sentiment index rose less than anticipated in April.



Eurozone

Eurozone's consumer price index (CPI) climbed in March.
Eurozone's trade balance narrowed in February.



Asia

Japan's merchandise trade surplus widened more than expected in March.



UK

The Rightmove house price index advanced in April.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 Japan	06:30	Capacity Utilisation (MoM) (Feb)	★	-2.80%*	4.70%	Monthly
 Japan	06:30	Industrial Production (MoM) (Feb) (F)	★★★	-1.30%*	4.30%	Monthly
 Japan	06:30	Industrial Production (YoY) (Feb) (F)	★★★	-2.00%*	-5.20%	Monthly
 Eurozone	10:00	Current Account s.a (Feb)	★★★	EUR25.50bn	EUR30.50bn	Monthly
 Portugal	10:00	Current Account Balance (Feb)	★	-	-EUR0.28bn	Monthly
 Switzerland	10:00	Total Sight Deposits (CHF) (16-Apr)	★	-	CHF701,300.00mn	Weekly
 Switzerland	10:00	Domestic Sight Deposits (CHF) (16-Apr)	★	-	CHF627,500.00mn	Weekly
 Italy	10:30	Current Account (Feb)	★	-	EUR0.71bn	Monthly
 Eurozone	11:00	Construction Output s.a. (MoM) (Feb)	★★★	0.20%	0.80%	Monthly
 Eurozone	11:00	Construction Output w.d.a. (YoY) (Feb)	★	-	-1.90%	Monthly
 South Africa	13:00	Food and beverages - Total Income (Feb)	★	-	ZAR3,755.50mn	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	418	40.27	59.54	318.00
PPC Ltd	322	5.57	34.17	133.33
Steinhoff International Holdings NV	211	-6.22	-9.83	102.88
Texton Property Fund Ltd	269	6.75	13.03	86.81
Royal Bafokeng Platinum Ltd	11420	3.87	3.82	83.83
Sasol Ltd	23351	9.12	10.30	74.35
City Lodge Hotels Ltd	430	1.18	12.27	72.00
Motus Holdings Ltd	9370	1.86	8.84	70.51
Nampak Ltd	315	-7.35	0.00	57.50
Sappi Ltd	5083	2.73	10.57	54.88
MTN Group Ltd	9278	5.47	6.83	54.15
Hammerson PLC	785	3.70	12.95	51.82
Stadio Holdings Ltd	295	-1.01	3.51	51.28
Emira Property Fund Ltd	931	0.11	9.53	48.90
Reunert Ltd	5125	4.10	1.49	48.53
Anglo American Platinum Ltd	208564	-3.56	-3.09	46.95
Impala Platinum Holdings Ltd	28597	1.19	4.47	46.91
Advtech Ltd	1370	5.50	5.34	46.36
Mpact Ltd	2017	0.85	0.85	45.63
Lewis Group Ltd	3050	3.39	-0.68	44.47
Truworths International Ltd	5000	4.71	4.52	42.43

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
RMB Holdings Ltd	194	6.59	9.60	38.57
Murray & Roberts Holdings Ltd	1070	-7.36	-1.20	34.25
Woolworths Holdings Ltd/South Africa	5308	7.62	7.34	34.24
Tsogo Sun Holdings Ltd	684	1.33	5.23	34.12
Hudaco Industries Ltd	10409	4.60	6.65	33.83
Massmart Holdings Ltd	5605	2.21	1.91	33.39
Raubex Group Ltd	2860	-1.72	0.70	33.02
KAP Industrial Holdings Ltd	420	-1.41	1.69	32.91
Anglo American PLC	63276	2.62	8.96	32.80
Cashbuild Ltd	30600	-1.03	0.06	32.10
Telkom SA SOC Ltd	4056	0.40	-4.25	32.07
Rebosis Property Fund Ltd	29	-12.12	20.83	31.82
Attacq Ltd	655	7.91	5.65	31.79
Investec PLC	4961	7.15	9.78	31.77
Northam Platinum Ltd	27585	3.04	7.18	31.65
Imperial Logistics Ltd	4813	-5.72	1.71	31.25
RDI REIT PLC	2362	-2.48	-4.22	31.22
Transaction Capital Ltd	3266	9.60	5.53	31.22
Exxaro Resources Ltd	18030	3.50	3.70	29.81
JSE All Share Index	68699.0	2.24	3.33	15.64

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