



ONE Minute Brief

17 MAY 2021

 Economic and Political News

Eskom will implement nationwide power cuts after breakdowns at 7 power plants.

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Phases 1B and 2 of the mass vaccination rollout to begin from today.

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South African Airways aims to resume flights in July or August.

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Gauteng premier David Makhura calls for tighter lockdown restrictions as Gauteng enters third wave.

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 South Africa Market 

South African markets closed in the green on Friday, boosted by gains in retail, commodity and property sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 66,598.13		▲ 60,573.37		▲ 12,685.44	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
429.48	0.65	362.29	0.60	186.25	1.49
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	-0.51	NA	-0.86	NA	2.80
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.68	12.10	0.35	11.39	0.59	5.18

 US Market 

US markets closed firmer on Friday, as investors shrugged off concerns over rising inflation.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,173.85		▲ 13,429.98		▲ 34,382.13	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
61.35	1.49	304.99	2.32	360.68	1.06
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	-0.18	NA	-3.82	NA	1.50
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
5.24	11.12	5.40	4.20	2.71	12.34

JSE All Share

S&P 500

 Top Gainers

Massmart Holdings Ltd	6.9%	-4.4%
EPP NV	6.8%	-4.4%
DRDGOLD Ltd	6.0%	-3.1%
Steinhoff International Holdings	4.6%	-3.0%
Tsogo Sun Gaming Ltd	4.6%	-2.9%

Top Losers 

Barloworld Ltd		
Arrowhead Properties		
Distell Group Holdings Ltd		
Advtech Ltd		
Allied Electronics Corp Ltd		

 Top Gainers

Seagate Technology Plc	12.4%	-3.8%
Western Digital Corp	8.3%	-2.6%
Carnival Corp	8.3%	-2.5%
Norwegian Cruise Line Holdings Ltd	8.1%	-2.2%
Royal Caribbean Cruises Ltd	7.4%	-1.8%

Top Losers 

Fox Corp - Class A		
Walt Disney Co/The		
AmerisourceBergen Corp		
Fox Corp - Class B		
Hormel Foods Corp		

 UK Market ▲

UK markets finished higher on Friday, buoyed by gains in banking and energy sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,043.61		▲ 15,416.64		▲ 6,385.14	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
80.28	1.15	216.96	1.43	96.81	1.54
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	1.06	NA	1.85	NA	1.84
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.82	9.03	0.85	12.38	3.33	15.02

 Asia Market ▲

Asian markets are trading mostly higher this morning. The Nikkei 225 Index is trading 1.4% lower at 27,695.27.

*As at 6:00 SAST

Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▼ 27,695.27		▲ 3,526.09		▲ 28,153.03	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-389.20	-1.39	35.72	1.02	125.46	0.45
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	-2.53	NA	1.26	NA	-2.43
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-1.25	2.33	0.14	0.50	1.22	2.92

FTSE 100

 Top Gainers

Burberry Group Plc	4.4%	-2.7%
Whitbread Plc	3.9%	-2.2%
Sage Group Plc/The	3.8%	-1.3%
BAE Systems Plc	3.5%	-1.0%
SSE Plc	3.4%	-0.9%

Top Losers 

Rio Tinto Plc	
Antofagasta Plc	
BHP Group Plc	
Evraz Plc	
Coca-Cola HBC AG	

Nikkei 225



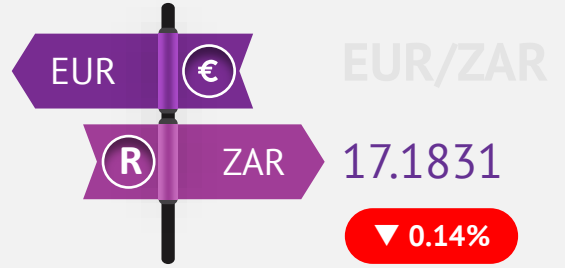

 Top Gainers

Ebara Corp	10.0%	-14.8%
Yamaha Motor Co Ltd	6.8%	-9.3%
Dentsu Group Inc d	5.5%	-8.1%
Credit Saison Co Ltd	4.1%	-8.0%
Tokyu Corp	3.7%	-6.1%





Top Losers 

Fujikura Ltd	
Mitsubishi Materials Corp	
COMSYS Holdings Corp	
Nissan Chemical Corp	
Konica Minolta Inc	

 Currencies

 <p>USD/ZAR 14.1629</p> <p>▼</p> <p>At 06:00 SAST, the US Dollar advanced 0.2% against the South African Rand. The US Dollar rose against the South African Rand on Friday.</p>	 <p>GBP/ZAR 19.9505</p> <p>▼</p> <p>At 06:00 SAST, the British Pound is trading 0.2% stronger against the South African Rand. The British Pound climbed against the South African Rand on Friday, following Bank of England's hawkish stance and optimism over gradual reopening.</p> <p>To Read More Click Here</p>	 <p>EUR/ZAR 17.1831</p> <p>▼ 0.14%</p> <p>At 06:00 SAST, the Euro increased 0.1% against the South African Rand. The Euro strengthened against the South African Rand on Friday.</p>	 <p>AUD/ZAR 10.9776</p> <p>▲</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.2% lower against the South African Rand. The Australian Dollar gained against the South African Rand on Friday.</p>
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 Commodities

 <p>▲ 0.20%</p> <p>Brent (\$/barrel) 68.85</p> <p>At 06:00 SAST, Brent crude oil rose. On Friday, Brent crude oil climbed. Meanwhile, Baker Hughes reported that US oil rig count rose by 8 to 352 last week.</p> <p>To Read More Click Here</p>	 <p>▲ 0.73%</p> <p>Gold (\$/oz) 1851.60</p> <p>At 06:00 SAST, gold prices edged higher. On Friday, gold prices rose, amid drop in the US Treasury yields.</p> <p>To Read More Click Here</p>	 <p>▲ 0.92%</p> <p>Platinum (\$/oz) 1234.00</p> <p>At 06:00 SAST, platinum prices advanced. On Friday, platinum prices climbed.</p>	 <p>Copper (\$/MT)* 10214.5</p> <p>On Friday, copper prices have fallen. * As of previous close</p>
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Major South African Corporate News

Foschini Group Limited

Group delivered a strong performance during 4Q21 with turnover growth of 21.0%.

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Major Global Economic News



US

The Michigan consumer sentiment index unexpectedly fell in May.

Manufacturing production rose for a second consecutive month in April.

Industrial production advanced less than expected in April.

Retail sales remained flat in April.



Eurozone

The European Central Bank (ECB) indicated that inflation and growth expectations are 'tilted to upside'.



Asia

China's house price index rose in April.
China's industrial production advanced as expected in April.

China's retail sales climbed less than expected in April.













Japan's producer price index (PPI) climbed more than anticipated in April.



UK

The Rightmove house price index advanced in May.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 China	04:00	Industrial Production (YoY) (Apr)	★★	9.80%*	14.10%	Monthly
 China	04:00	Retail Sales (YoY) (Apr)	★★★	17.70%*	34.20%	Monthly
 China	04:00	NBS Press Conference	★★	-	-	As Scheduled
 Japan	08:00	Machine Tool Orders (YoY) (Apr) (P)	★★★	-	65.10%	Monthly
 Switzerland	08:30	Producer and Import Prices (MoM) (Apr)	★	-	0.60%	Monthly
 Switzerland	10:00	Total Sight Deposits (CHF) (14-May)	★	-	CHF705,000.00mn	Weekly
 Canada	14:15	Housing Starts s.a. (Apr)	★★★	250.00K	335.20K	Monthly
 US	14:30	NY Empire State Manufacturing Index (May)	★★	22.55	26.30	Monthly
 US	16:00	NAHB Housing Market Index (May)	★	84.00	83.00	Monthly
 US	16:25	Fed's Clarida speech	★★	-	-	As Scheduled
 UK	18:30	BoE's Haldane speech	★	-	-	As Scheduled
 US	22:00	Net Long-Term TIC Flows (Mar)	★★	-	USD4.20bn	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	490	7.22	5.83	390.00
PPC Ltd	372	10.71	24.41	169.57
Steinhoff International Holdings NV	203	-0.49	-6.88	95.19
Texton Property Fund Ltd	274	-2.14	3.40	90.28
Sasol Ltd	23700	-1.53	-2.87	76.96
City Lodge Hotels Ltd	442	1.84	2.79	76.80
Royal Bafokeng Platinum Ltd	10850	-0.29	-1.36	74.66
Motus Holdings Ltd	9451	3.66	3.64	71.98
Lewis Group Ltd	3380	11.74	10.28	60.10
MTN Group Ltd	9605	-0.44	4.84	59.58
Stadio Holdings Ltd	311	3.67	2.98	59.49
Sun International Ltd/South Africa	1948	17.99	29.09	57.35
Emira Property Fund Ltd	973	-0.10	-1.92	55.62
Mpact Ltd	2140	0.47	-4.55	54.51
RMB Holdings Ltd	127	2.42	11.95	52.74
Investec PLC	5703	-3.34	-2.16	51.47
Investec Ltd	5527	-2.50	-0.04	50.85
Truworths International Ltd	5154	3.70	7.08	46.82
Distell Group Holdings Ltd	13844	3.66	9.70	45.66
Reunert Ltd	5022	-2.30	3.31	45.54
Long4Life Ltd	478	6.70	14.35	45.29

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Hudaco Industries Ltd	11200	-1.34	1.74	44.00
Massmart Holdings Ltd	6008	11.84	-11.76	42.98
Advtech Ltd	1324	-0.90	-4.06	41.45
Nampak Ltd	282	-5.37	-8.44	41.00
Rebosis Property Fund Ltd	31	10.71	3.33	40.91
Octodec Investments Ltd	930	-2.31	5.80	39.94
Glencore PLC	6448	1.42	8.28	39.74
Hammerson PLC	715	-7.62	-10.62	38.28
Attacq Ltd	675	-3.57	-7.53	35.81
Anglo American PLC	64693	-2.86	4.61	35.77
Transaction Capital Ltd	3346	-2.05	1.73	34.43
Sappi Ltd	4409	-2.43	-9.74	34.34
RDI REIT PLC	2412	0	0	34.00
Raubex Group Ltd	2880	8.27	8.64	33.95
Metair Investments Ltd	2427	3.72	6.63	33.90
Tsogo Sun Holdings Ltd	680	3.82	4.62	33.33
KAP Industrial Holdings Ltd	420	0	3.70	32.91
Imperial Logistics Ltd	4870	-2.87	2.85	32.80
Pepkor Holdings Ltd	1806	6.24	11.69	32.50
JSE All Share Index	66598.0	-2.80	-0.51	12.10

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