



ONE Minute Brief

21 MAY 2021



 Economic and Political News

South African Reserve Bank (SARB) keeps key interest rate steady at 3.5%.

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State Capture Commission adjourns proceedings for 'serious security reasons'.

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Phumzile van Damme resigns from Democratic Alliance.

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National Union of Mineworkers (NUM) calls for 15% wage increase for workers in gold sector.

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Judge to rule after SA sued over Sasol, Eskom pollution.

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 South Africa Market 

South African markets closed in the green yesterday, after the SARB kept its key interest rate unchanged at record low levels, as widely expected.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 66,124.44		▲ 60,068.05		▲ 12,729.01	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
268.63	0.41	291.14	0.49	109.49	0.87
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.71	-1.21	-0.83	-1.68	0.34	3.15
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.68	11.30	0.35	10.46	0.59	5.54

 US Market 

US markets closed firmer yesterday, ending its losing streak of three consecutive sessions, buoyed by gains in technology stocks and following upbeat jobless claims data.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,159.12		▲ 13,535.74		▲ 34,084.15	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
43.44	1.06	236	1.77	188.11	0.55
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.35	-0.53	0.79	-3.06	-0.87	0.62
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
5.24	10.73	5.40	5.02	2.71	11.36

JSE All Share

S&P 500

 Top Gainers

Company	Gain	Loss	Company	Gain	Loss
Curro Holdings Ltd	5.6%	-4.8%	Super Group Ltd		
Liberty Two Degrees	4.9%	-4.7%	Montauk Renewables Inc		
Hosken Consolidated Investments Ltd	3.5%	-4.0%	Grindrod Ltd		
Investec Ltd	3.2%	-3.3%	Foschini Group Ltd		
Tiger Brands Ltd	3.1%	-3.3%	Ninety One Ltd		

Top Losers 

 Top Gainers

Company	Gain	Loss	Company	Gain	Loss
Enphase Energy Inc	8.5%	-7.0%	Ralph Lauren Corp –Class A		
Hormel Foods Corp	7.4%	-4.1%	Discovery Inc –Series C		
ViacomCBS Inc –Class B	4.6%	-4.0%	Gap Inc		
Maxim Integrated Pro	4.6%	-3.9%	L Brands Inc		
Applied Materials Inc	4.4%	-3.8%	Discovery Inc – Series A		

Top Losers 

 UK Market ▲

UK markets finished higher yesterday, boosted by gains in industrial sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,019.79		▲ 15,370.26		▲ 6,343.58	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
69.59	1.00	256.70	1.70	81.03	1.29
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.34	0.72	-0.30	1.55	-0.65	1.18
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.82	8.66	0.85	12.04	3.33	14.27

 Asia Market ▼

Asian markets are trading mostly lower this morning. The Nikkei 225 Index is trading 0.6% higher at 28,257.96.

*As at 6:00 SAST

Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 28,257.96		▼ 3,491.04		▼ 28,381.13	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
159.71	0.57	-15.90	-0.45	-69.16	-0.24
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.05	-2.48	0.47	1.74	1.51	-0.96
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-1.25	2.38	0.14	0.98	1.22	4.48

FTSE 100

 Top Gainers

Experian Plc	4.7%	-2.3%
Rightmove Plc	3.8%	-2.3%
Compass Group Plc	3.6%	-1.4%
Flutter Entertainment Plc	3.6%	-1.3%
Intermediate Capital Group Plc	3.2%	-0.7%

 Top Losers

Antofagasta Plc	
Tesco Plc	
International Consolidated Airlines Group	
Fresnillo Plc	
BAE Systems Plc	

Nikkei 225


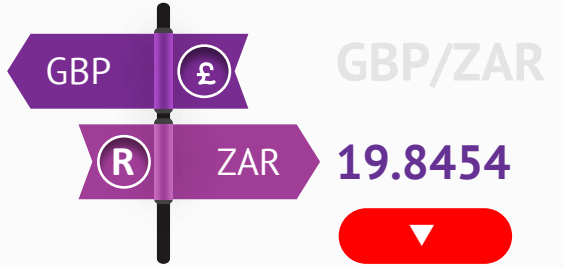
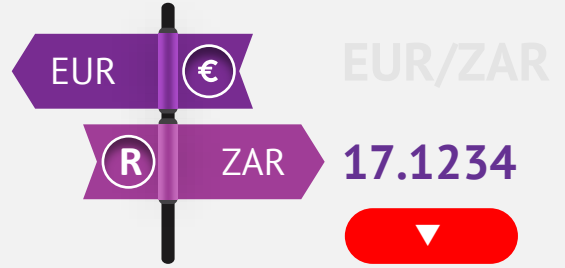

 Top Gainers

CyberAgent Inc	4.1%	-3.2%
Recruit Holdings Co Ltd	3.5%	-2.8%
Toppan Printing Co Ltd	3.3%	-2.6%
Toho Co Ltd	2.5%	-2.6%
Olympus Corp	2.4%	-2.4%





 Top Losers

Inpex Corp	
Showa Denko KK	
Pacific Metals Co Ltd	
Dowa Holdings Co Ltd	
Fujikura Ltd	

 Currencies

 <p>USD/ZAR 13.9993</p> <p>At 06:00 SAST, the US Dollar advanced 0.18% against the South African Rand. The US Dollar fell against the South African Rand yesterday, following the US Federal Reserve's meeting minutes.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.8454</p> <p>At 06:00 SAST, the British Pound is trading 0.10% higher against the South African Rand. The British Pound declined against the South African Rand yesterday.</p>	 <p>EUR/ZAR 17.1234</p> <p>At 06:00 SAST, the Euro rose 0.21% against the South African Rand. The Euro weakened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.8573</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.09% lower against the South African Rand. The Australian Dollar dropped against the South African Rand yesterday.</p>
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 Commodities

 <p>▲ 0.09% Brent (\$/barrel) 65.17</p> <p>At 06:00 SAST, Brent crude oil rose. Yesterday, Brent crude oil dropped, amid reports of progress towards a deal to lift the US sanctions against Iran.</p> <p>To Read More Click Here</p>	 <p>▼ -0.31% Gold (\$/oz) 1,876.00</p> <p>At 06:00 SAST, gold prices edged lower. Yesterday, gold prices slightly rose, amid weakness in the US Dollar and concerns over rising inflation.</p> <p>To Read More Click Here</p>	 <p>▼ -0.22% Platinum (\$/oz) 1,202.30</p> <p>At 06:00 SAST, platinum prices declined. Yesterday, platinum prices advanced.</p>	 <p>Copper (\$/MT)* 10,031.50</p> <p>Yesterday, copper prices have risen. * As of previous close</p>
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Major South African Corporate News

Netcare Limited

Expects its 1H21 EPS to be between 25.00c and 27.60c compared to 43.60c in last year.

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Tiger Brands Limited

1H21 revenues rose to ZAR16.45bn from ZAR15.18bn posted in the same period last year.

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Woolworths Holdings Limited

Expects its FY21 EPS to be more than 20%, compared to 58.2c in the last year.

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Major Global Economic News



US

The Philadelphia Fed manufacturing index fell more than expected in May.

Initial jobless claims dropped to its lowest level since mid-March 2020 last week.

The leading indicator advanced in April.



Eurozone

Eurozone's construction output rebounded in March.

Eurozone's current account surplus narrowed in March.

Germany's producer price index (PPI) climbed at its fastest pace since August 2011 in April.



Asia

Australia's Commonwealth Bank manufacturing PMI rose in May.

Australia's retail sales rose in April.

Japan's national consumer price index (CPI) dropped in April.

Japan's Jibun Bank manufacturing PMI unexpectedly fell in May.















UK

The balance of firms reporting total order book above normal rose in May.

The GfK consumer confidence index rose to its highest level since March 2020 in May.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 Japan	02:30	Nomura/ JMMA Manufacturing PMI (May) (P)	★★★	52.50*	53.60	Monthly
 UK	08:00	Retail Sales (MoM) (Apr)	★	1.50%	5.40%	Monthly
 Germany	09:30	Markit Manufacturing PMI (May) (P)	★★★	65.80	66.20	Monthly
 Germany	09:30	Markit Services PMI (May) (P)	★★★	50.80	49.90	Monthly
 Eurozone	10:00	Markit Manufacturing PMI (May) (P)	★★★	62.00	62.90	Monthly
 Eurozone	10:00	Markit Services PMI (May) (P)	★★★	49.10	50.50	Monthly
 UK	10:30	Markit Manufacturing PMI (May) (P)	★	-	60.90	Monthly
 US	15:45	Markit Manufacturing PMI (May) (P)	★★★	60.50	60.50	Monthly
 US	15:45	Markit Services PMI (May) (P)	★★★	61.90	64.70	Monthly
 Eurozone	16:00	Consumer Confidence (May) (P)	★★★	-	-8.10	Monthly
 US	16:00	Existing Home Sales (MoM) (Apr)	★★★	-	-3.70%	Monthly
 US	19:00	Baker Hughes US Rig Count (21-May)	★★★	-	453.00	Weekly

Note: ★★★ High ★★ Medium ★ Low

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