



ONE **Brief** Minute

23 JUNE 2021



 Economic and Political News

South Africa's (SA) leading indicator rises to 125.80 in April, compared to a revised level of 121.40 in March.

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Auditor-general Tsakani Maluleke reveals ZAR26bn in irregular expenditure at municipalities.

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President Cyril Ramaphosa announces establishment of National Ports Authority as an independent subsidiary of Transnet.

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SA presidential body recommends lower emissions target.

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Cost of Gupta state capture rises to ZAR57bn.

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 South Africa Market ▼

South African markets closed in the red yesterday, weighed down by losses in retail and industrial sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 65,551.73		▲ 59,493.46		▼ 12,834.23	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-11.75	-0.02	21.21	0.04	-36.52	-0.28
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.13	-3.55	-0.02	-3.71	-1.24	-4.62
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
1.53	10.34	1.12	9.40	9.04	6.42

 US Market ▲

US markets closed firmer yesterday, as Federal Reserve (Fed) chair Jerome Powell pledged not to raise rates too quickly and buoyed by gains in technology sector stocks.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,246.44		▲ 14,253.27		▲ 33,945.58	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
21.65	0.51	111.79	0.79	68.61	0.20
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
1.92	1.01	1.59	3.67	1.97	-1.69
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.55	13.06	-1.53	10.59	1.93	10.91

JSE All Share

S&P 500

 Top Gainers

Thungela Resources Ltd	7.2%	-5.4%
Sirius Real Estate Ltd	4.8%	-4.7%
African Rainbow Minerals Ltd	3.9%	-4.1%
Kumba Iron Ore Ltd	3.8%	-3.8%
Italtile Ltd	3.6%	-3.7%

Top Losers 

Metair Investments Ltd	
Investec Property Fund Ltd	
Curro Holdings Ltd	
Alexander Forbes Group Holdings Ltd	
Bytes Technology Group Plc	

 Top Gainers

L Brands Inc	5.0%	-3.5%
Etsy Inc	4.2%	-2.9%
Cintas Corp	3.2%	-2.2%
Twitter Inc	2.9%	-2.1%
Tractor Supply Co	2.9%	-2.0%

Top Losers 

Iron Mountain Inc	
Evergny Inc	
Kimco Realty Corp	
Carnival Corp	
Royal Caribbean Cruises Ltd	

 UK Market 

UK markets finished higher yesterday, boosted by gains in energy and homebuilder stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,090.01		▲ 15,636.33		▲ 6,611.50	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
27.72	0.39	33.09	0.21	8.96	0.14
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
1.03	0.96	1.22	1.40	0.64	2.55
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.76	9.74	1.88	13.98	2.83	19.10

 Asia Market 

Asian markets are trading higher this morning. The Nikkei 225 Index is trading 0.1% higher at 28,901.74.

*As at 6:00 SAST

Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 28,901.74		▲ 3,573.61		▲ 28,749.34	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
17.61	0.06	16.20	0.46	439.58	1.55
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.28	0.08	0.92	-1.61	-1.71	-2.89
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.16	5.25	4.89	2.43	1.49	3.96

FTSE 100

 Top Gainers

British Land Co Plc	4.7%	-2.6%
Land Securities Group Plc	3.2%	-1.7%
Royal Dutch Shell Plc –Class B	2.8%	-1.6%
Melrose Industries Plc	2.5%	-1.5%
Flutter Entertainment Plc	2.4%	-1.4%

Top Losers 

Hargreaves Lansdown Plc	
DS Smith Plc	
International Consolidated Airlines Group	
Prudential Plc	
GlaxoSmithKline Plc	

Nikkei 225


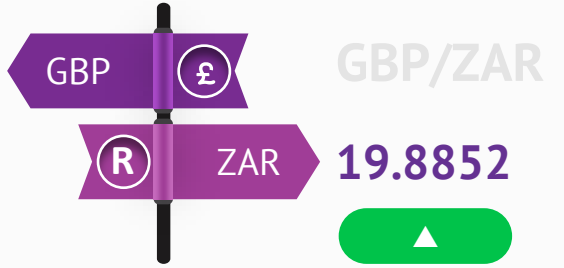
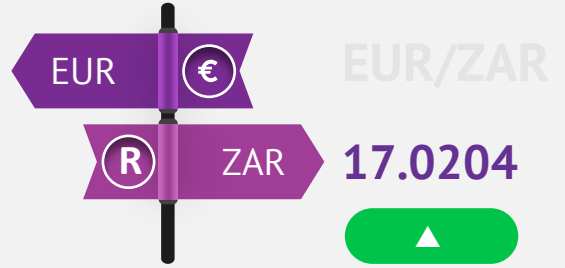

 Top Gainers

Z Holdings Corp	2.9%	-5.4%
CyberAgent Inc	2.9%	-2.4%
M3 Inc	2.7%	-2.1%
Dentsu Group Inc	2.2%	-2.0%
SUMCO Corp	2.1%	-2.0%




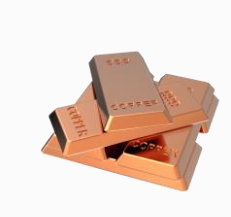
Top Losers 

Eisai Co Ltd	
NEC Corp	
West Japan Railway Co	
JFE Holdings Inc	
Mitsubishi Chemical Holdings Corp	

 Currencies

 <p>USD/ZAR 14.2763</p> <p>At 06:00 SAST, the US Dollar marginally advanced against the South African Rand. The US Dollar rose against the South African Rand yesterday.</p>	 <p>GBP/ZAR 19.8852</p> <p>At 06:00 SAST, the British Pound is trading 0.06% weaker against the South African Rand. The British Pound climbed against the South African Rand yesterday.</p>	 <p>EUR/ZAR 17.0204</p> <p>At 06:00 SAST, the Euro fell 0.13% against the South African Rand. The Euro strengthened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.7724</p> <p>At 06:00 SAST, the Australian Dollar is trading higher against the South African Rand. The Australian Dollar gained against the South African Rand yesterday.</p>
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 Commodities

 <p>Brent (\$/barrel) 75.33</p> <p>▲ 0.70%</p> <p>At 06:00 SAST, Brent crude oil rose, after the API reported that crude oil inventories declined 7.2mn bls last week. Yesterday, Brent crude oil dropped, amid speculation that the OPEC and its allies might boost oil output.</p> <p>To Read More Click Here</p>	 <p>Gold (\$/oz) 1,781.80</p> <p>▲ 0.31%</p> <p>At 06:00 SAST, gold prices edged higher. Yesterday, gold prices fell.</p>	 <p>Platinum (\$/oz) 1,081.10</p> <p>▲ 1.02%</p> <p>At 06:00 SAST, platinum prices gained. Yesterday, platinum prices advanced.</p>	 <p>Copper (\$/MT)* 9,274.60</p> <p>Yesterday, copper prices have risen. * As of previous close</p>
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Major South African Corporate News

Hudaco Industries Limited

Expects 1H21 EPS and HEPS to be between 660.00c and 710.00c.

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Omnia Holdings Limited

FY21 revenues dropped to ZAR17.79bn.

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Major Global Economic News



US

The Richmond Fed manufacturing index advanced in June.

Existing home sales dropped for a fourth consecutive month in May.

Fed Jerome Powell reiterated that higher inflation will be transitory.



Eurozone

Eurozone's consumer confidence index improved in June.



Asia

Australia's Commonwealth Bank manufacturing PMI fell in June.

Japan's Jibun Bank manufacturing PMI dropped in June.

BoJ minutes: Central Bank sees prospects for faster-than-expected recovery.






UK

Public sector net borrowings dropped in May.

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

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 Japan	02:30	Nomura/JMMA Manufacturing PMI (Jun) (P)	★★★	51.50*	53.00	Monthly
 Japan	07:00	Leading Economic Index (Apr) (F)	★★★	-	102.40	Monthly
 Germany	09:30	Markit Manufacturing PMI (Jun) (P)	★★★	63.00	64.40	Monthly
 Germany	09:30	Markit Services PMI (Jun) (P)	★★★	55.50	52.80	Monthly
 Eurozone	10:00	Markit Manufacturing PMI (Jun) (P)	★★★	62.10	63.10	Monthly
 Eurozone	10:00	Markit Services PMI (Jun) (P)	★★★	57.80	55.20	Monthly
 South Africa	10:00	Consumer Price Index (YoY) (May)	★★	5.20%	4.40%	Monthly
 US	15:45	Markit Manufacturing PMI (Jun) (P)	★★★	61.40	62.10	Monthly
 US	15:45	Markit Services PMI (Jun) (P)	★★★	70.00	70.40	Monthly
 US	16:00	New Home Sales (MoM) (May)	★★★	-	-5.90%	Monthly
 US	16:30	EIA Crude Oil Stocks Change (Bl) (18-Jun)	★★★	-3.62mn	-7.36mn	Weekly

Note: ★★★ High ★★ Medium ★ Low

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