



# ONE **Brief** Minute

30 JUNE 2021



 Economic and Political News

South Africa's (SA) non-farm payrolls drop 0.1% on a QoQ basis in 1Q21, compared to a revised rise of 0.9% in the prior quarter.



Former President Jacob Zuma found guilty of contempt of court and receives 15-month jail term.

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President Cyril Ramaphosa plans to permanently dismiss Health Minister Zweli Mkhize over multimillion-rand contract irregularity.

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Automobile Association (AA) forecasts petrol prices to increase about 23 c/l, diesel by 38 c/l and illuminating paraffin 32 c/l.

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SA's draft oil exploration and production law seen unlikely to be approved until 2022.

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 South Africa Market ▲

South African markets closed in the green yesterday, boosted by gains in banking and retail sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 66,548.71		▲ 60,495.83		▲ 13,080.48	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
739.36	1.12	675.17	1.13	291.09	2.28
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.50	-2.08	0.59	-2.08	0.00	-2.79
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
1.53	12.02	1.12	11.25	9.04	8.46

 US Market ▲

US markets closed firmer yesterday, led by gains in technology and banking sector stocks.

S&P 500 futures ↑

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,291.80		▲ 14,528.33		▲ 34,292.29	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
1.19	0.03	27.82	0.19	9.02	0.03
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.26	2.09	1.17	5.67	-0.41	-0.69
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.55	14.26	-1.53	12.73	1.93	12.04

JSE All Share

S&P 500

 Top Gainers

Massmart Holdings Ltd	6.5%	-10.3%
Famous Brands Ltd	5.6%	-7.8%
Truworths International Ltd	5.3%	-3.6%
Mr Price Group Ltd	5.1%	-3.1%
Foschini Group Ltd	4.4%	-3.1%

Top Losers 

Arrowhead Properties		
Hosken Consolidated Investments Ltd		
Lighthouse Capital Ltd		
African Rainbow Capital Investments Ltd		
Pan African Resources Plc		

 Top Gainers

Skyworks Solutions Inc	4.5%	-3.9%
Qorvo Inc	4.5%	-3.2%
Morgan Stanley	3.4%	-3.0%
Xilinx Inc	3.1%	-2.7%
Advanced Micro Devices Inc	2.8%	-2.7%

Top Losers 

Fox Corp –Class A		
Fox Corp – Class B		
ViacomCBS Inc		
Northrop Grumman Corp		
NRG Energy Inc		

 UK Market ▲

UK markets finished higher yesterday, buoyed by gains in mining and retail sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,087.55		▲ 15,690.59		▲ 6,567.43	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
14.58	0.21	136.41	0.88	9.41	0.14
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.68	0.92	0.53	1.75	-0.84	1.87
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.76	9.71	1.88	14.37	2.83	18.30

 Asia Market ▲

Asian markets are trading mostly higher this morning, amid rise in oil prices. The Nikkei 225 Index is trading marginally higher at 28,818.92.

\*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 28,818.92		▲ 3,581.72		▼ 28,950.47	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
6.31	0.02	8.54	0.24	-43.63	-0.15
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.87	-0.16	-0.95	-1.17	-1.00	-0.54
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.16	4.99	4.89	2.88	1.49	6.47

FTSE 100

 Top Gainers

Just Eat Takeaway.com NV	3.9%	-3.3%
Johnson Matthey Plc	2.5%	-2.2%
Evraz Plc	2.1%	-1.9%
Ocado Group Plc	2.1%	-1.8%
Pershing Square Holdings Ltd	2.1%	-1.6%

 Top Losers

Polymetal In		
BT Group Plc		
Rolls-Royce Holdings Plc		
Fresnillo Plc		
Standard Life Aberdeen Plc		

Nikkei 225


 Top Gainers


M3 Inc	3.3%	-4.0%
Fujikura Ltd	3.0%	-3.8%
Chugai Pharmaceutical Co Ltd	2.5%	-3.3%
Taiyo Yuden Co Ltd	2.2%	-3.3%
Sumitomo Dainippon Pharma Co Ltd	2.0%	-2.6%


 Top Losers

Eisai Co Ltd		
J Front Retailing Co Ltd		
Marui Group Co Ltd		
Takashimaya Co Ltd		
Hino Motors Ltd		

 Currencies

**USD**  **USD/ZAR**


**ZAR**  **14.3267**





At 06:00 SAST, the US Dollar retreated 0.18% against the South African Rand.

The US Dollar rose against the South African Rand yesterday, as new coronavirus outbreaks renewed worries over global economic recovery.

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**GBP**  **GBP/ZAR**


**ZAR**  **19.8458**




At 06:00 SAST, the British Pound is trading 0.09% weaker against the South African Rand.

The British Pound climbed against the South African Rand yesterday.


**EUR**  **EUR/ZAR**


**ZAR**  **17.0511**




At 06:00 SAST, the Euro fell 0.12% against the South African Rand.

The Euro strengthened against the South African Rand yesterday.

**AUD**  **AUD/ZAR**

**ZAR**  **10.7752**





At 06:00 SAST, the Australian Dollar is trading 0.05% lower against the South African Rand.

The Australian Dollar dropped against the South African Rand yesterday, amid concerns over spike in Covid-19 cases in the country.

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 Commodities

  **0.41%**

**Brent (\$/barrel)**



**75.07**

At 06:00 SAST, Brent crude oil rose, after the API reported that crude oil inventories declined by 8.2mn bls last week.

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Yesterday, Brent crude oil climbed, as comments by OPEC's secretary general Muhammad Barkindo revived hopes for recovery in oil demand.

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  **-0.14%**



**Gold (\$/oz)**

**1,761.20**

At 06:00 SAST, gold prices edged lower.

Yesterday, gold prices fell, amid strength in the US Dollar.

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  **0.00%**

**Platinum (\$/oz)**

**1,067.50**

At 06:00 SAST, platinum prices remained unchanged.

Yesterday, platinum prices dropped.

 **Copper (\$/MT)\***

**9,312.25**

Yesterday, copper prices have fallen.

\* As of previous close

## Major South African Corporate News

### KAP Industrial Holdings

11M21 sales volumes for polyethylene terephthalate (PET) dropped to 164,915 tonnes.

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### RMB Holdings Limited

9M21 revenue stood at ZAR38.00mn.

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## Major Global Economic News



### US

The CB consumer confidence index unexpectedly climbed to a 16-month high in June.

The housing price index rose in April.



### Eurozone

Eurozone's services sentiment indicator climbed in June.

Eurozone's economic sentiment indicator advanced to a 21-year high in June.

Germany's consumer price index (CPI) advanced as expected in June.



### Asia

Australia's private sector credit demand rose in May.

China's NBS non-manufacturing PMI declined in June.

China's NBS manufacturing PMI fell in June.

Japan's industrial production dropped in May.












### UK

The BRC shop price index dropped in May.

Mortgage approvals unexpectedly advanced in May.

The Nationwide house prices rose as expected in June.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 UK	01:01	BRC Shop Price Index (YoY) (Jun)	★	-0.70%*	-0.60%	Monthly
 Japan	01:50	Industrial Production (MoM) (May) (P)	★★★	-5.90%*	2.90%	Monthly
 China	03:00	NBS Manufacturing PMI (Jun)	★★	50.90*	51.00	Monthly
 China	03:00	NBS Non-manufacturing PMI (Jun)	★	53.50*	55.20	Monthly
 South Africa	08:00	Private Sector Credit (YoY) (May)	★	-0.90%	-1.76%	Monthly
 UK	08:00	Gross Domestic Product s.a. (QoQ) (Q1) (F)	★	-1.50%	1.30%	Quarterly
 Germany	09:55	Unemployment Rate s.a. (Jun)	★★★	5.90%	6.00%	Monthly
 South Africa	14:00	Trade Balance (May)	★★	ZAR46.50bn	ZAR51.24bn	Monthly
 US	14:15	ADP Employment Change (Jun)	★★★	600.00K	978.00K	Monthly
 US	15:45	Chicago PMI (Jun)	★★★	70.00	75.20	Monthly
 US	16:30	EIA Crude Oil Stocks Change (Bl) (25-Jun)	★★★	-4.46mn	-7.61mn	Weekly

Note: ★★★ High ★★ Medium ★ Low

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