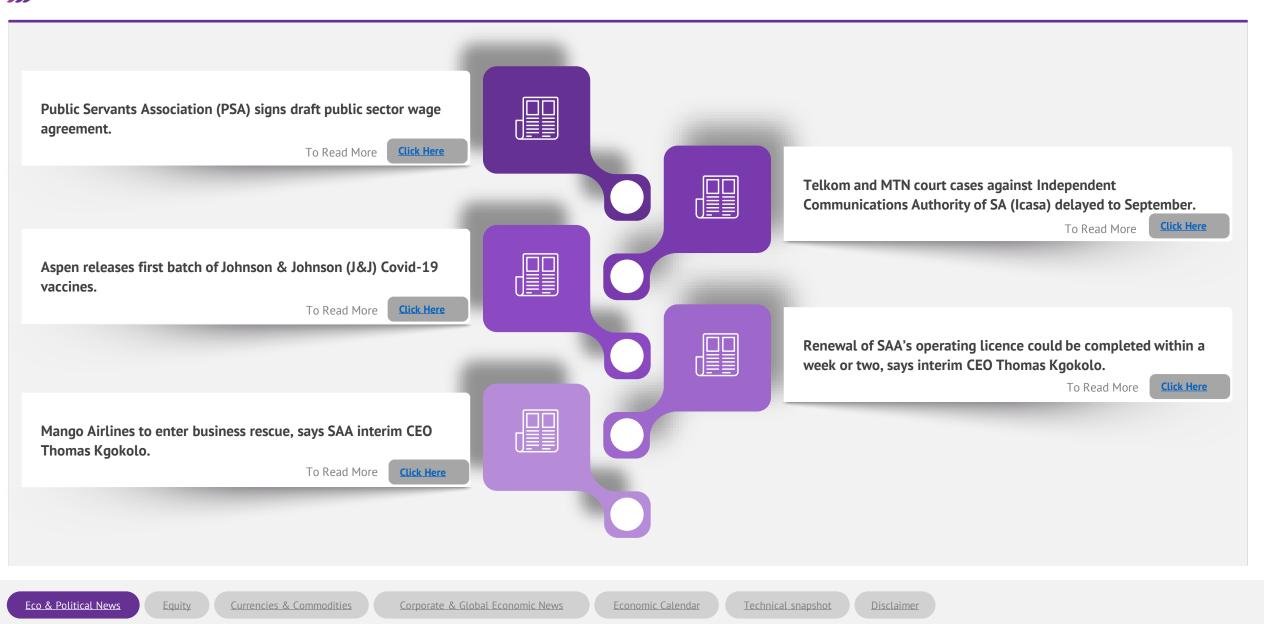


ONE by Minute b

27 JULY 2021

Economic and Political News



ONE MINUTE BRIEF | 27 July 2021



South Africa Market 🔻

South African markets closed mostly lower yesterday, weighed down by losses in industrial sector stocks.

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| JSE All Sh | are (ZAR) | JSE Top 4 | 10 (ZAR) | JSE Africa | Fin. (ZAR) |
|-------------------|---------------------|-------------------|-------------------|---------------------|---------------------|
| • | 68,051.05 | A | 61,946.37 | • | 12,704.90 |
| 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg |
| -12.65 | - <mark>0.02</mark> | 13.39 | 0.02 | -115.49 | -0.90 |
| WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. |
| -0.02 | 2.72 | 0.02 | 2.97 | - <mark>0.90</mark> | - <mark>3.04</mark> |
| Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. |
| -2.52 | 14.55 | -2.62 | 13.91 | -2.62 | 5.35 |

US Market 🔺

US markets closed firmer yesterday, ahead of the US Federal Reserve's (Fed) policy meeting and corporate earnings results.

S&P 500 futures

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| S&P 500 (USD) | | Nasdaq Composite (USD) DJIA (USD) | | (USD) | |
|-------------------|------------|-----------------------------------|-------------------|---------------------|------------|
| | 4,422.30 | ▲ 14,840.71 | | ▲ 35,144.31 | |
| 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg |
| 10.51 | 0.24 | 3.72 | 0.03 | 82.76 | 0.24 |
| WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. |
| 0.24 | 2.90 | 0.03 | 2.32 | 0.24 | 1.86 |
| Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. |
| 2.22 | 17.74 | 5.49 | 15.15 | - <mark>0.08</mark> | 14.83 |

| | JSE All Share | | | S&P 500 | |
|-----------------------------------|---------------------------|---------------------------------|-------------------------------|-------------------|--------------------------|
| Top Gainers | | Top Losers 📐 | Top Gainers | | Top Losers 📐 |
| Arrowhead Properties | 8.4% -7.6% | Prosus NV | Hasbro Inc | 12.2% -9.0% | Willis Towers Watson Plc |
| Anglo American Platinum Ltd | 7.9% -7.2% | Naspers Ltd | Aon Plc | 8.2% -4.2% | Twitter Inc |
| Impala Platinum Holdings Ltd | 5.0% - 4.2% | Montauk Renewables Inc | Live Nation Entertainment Inc | 5.8% -3.7% | Moderna Inc |
| Capital & Counties Properties Plc | 4.1% - 4.0% | Tsogo Sun Hotels Ltd | Carnival Corp | 5.5% -3.3% | Lockheed Martin Corp |
| Northam Platinum Ltd | 4.1% -3.9% | Tiger Brands Ltd | NOV Inc | 5.0% -2.8% | Catalent Inc |
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W UK Market **V**

UK markets finished slightly lower yesterday, led by losses in banking and energy sector stocks.

FTSE 100 futures

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|-----|------|------|-------------------|
|-----|------|------|-------------------|

| FTSE 100 (GBP) | | DAX 30 (EUR) | | CAC 40 (EUR) | |
|-------------------|------------|-----------------------|------------|-------------------|------------|
| • | 7,025.43 | ▼ 15,618.98 ▲ 6,578.6 | | 6,578.60 | |
| 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg |
| -2.15 | -0.03 | -50.31 | -0.32 | 9.78 | 0.15 |
| WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. |
| -0.03 | -0.17 | -0.32 | 0.57 | 0.15 | 1.09 |
| Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. |
| 0.21 | 8.74 | 0.71 | 13.85 | 0.94 | 18.50 |



Asian markets are trading mostly higher this morning, ahead of Fed's monetary policy meet. The Nikkei 225 Index is trading 0.5% higher at 27,961.02.

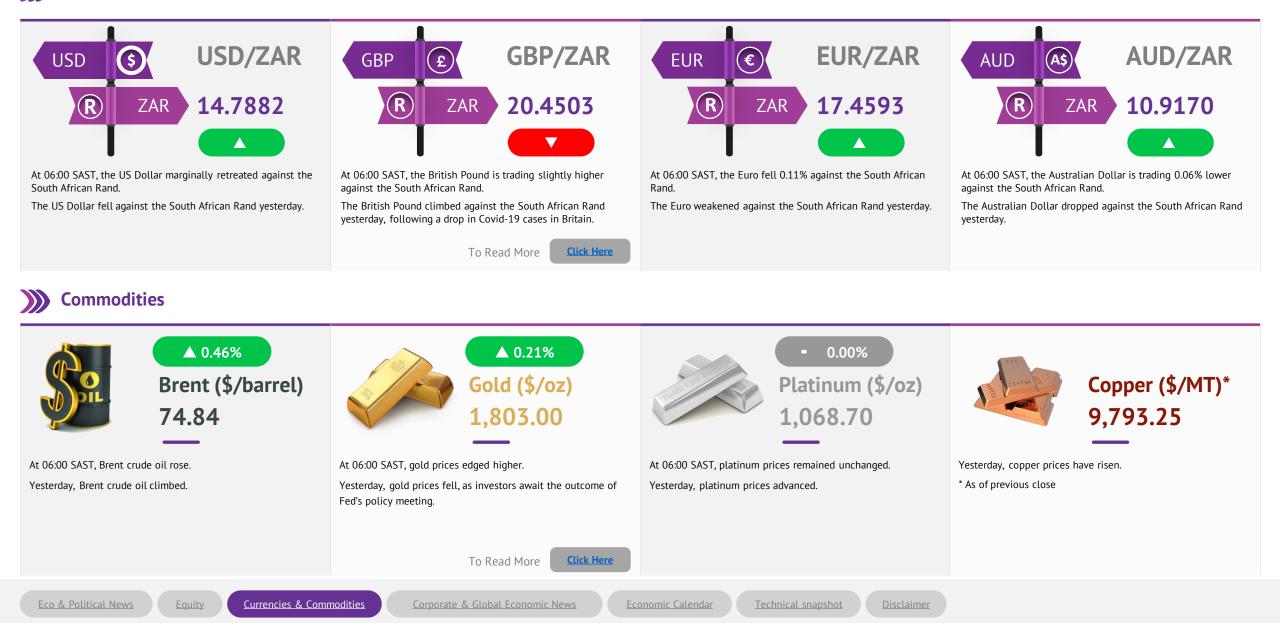
*As at 6:00 SAST

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| Nikkei 2 | 225* (JPY) Shanghai Composite* (CNY) | | Hang Seng [*] (HKD) | | |
|-------------------|--------------------------------------|-------------------|------------------------------|-------------------|---------------------|
| ▲ | 27,961.02 | ▲ 3,472.40 | | ▼ 25,893.86 | |
| 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg | 1 Day Chg | 1 D % Chg |
| 127.73 | 0.46 | 4.96 | 0.14 | -298.46 | -1.14 |
| WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. | WTD % Chg. | MTD % Chg. |
| 1.04 | - <mark>3.33</mark> | -2.34 | - <mark>3.4</mark> 5 | -4.13 | -9.14 |
| Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. | Prev. Month % Chg | YTD % Chg. |
| -0.24 | 1.42 | -0.67 | - <mark>0.16</mark> | -1.11 | - <mark>3.81</mark> |

| | FTSE 100 | | | Nikkei 225 | |
|---|--------------------------|----------------------------------|------------------------------------|---------------------------|--|
| Top Gainers | | Top Losers 📐 | Top Gainers | | Top Losers 📐 |
| International Consolidated Airlines Group | 4.6% -2.7% | Unilever Plc | Sumitomo Metal Mining Co Ltd | 4.7% -7.6% | Rakuten Inc |
| Antofagasta Plc | 4.1% -2.6% | London Stock Exchange Group Plc | Fujikura Ltd | 4.4% -2.4% | Sumitomo Dainippon Ph <mark>arma Co Ltd</mark> |
| Glencore Plc | 3.3% -2.4% | B&M European Value Retail SA | Mitsui Mining & Smelting Co Ltd | 3.6% -2.4% | Nitto <mark>Denko Corp</mark> |
| Anglo American Plc | 3.2% -2.3% | Smith & Nephew Plc | Mitsui E&S Holdings Co Ltd | 3.2% - 2.4% | Eisai Co Ltd |
| BHP Group Plc | 3.1% -2.2% | AstraZeneca Plc | Pacific Metals Co Ltd | 3.1% -1.9% | Kyowa Hakko Kir <mark>in Co Ltd</mark> |
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| | Country | SAST | Economic Indicator | Relevance | Consensus/*Actuals | Previous | Frequency |
|----|---------|-------|--|--------------|--------------------|----------|--------------|
| | Japan | 01:50 | Corporate Service Price (YoY) (Jun) | *3 | 1.40%* | 1.50% | Monthly |
| *3 | China | 03:30 | Industrial Profits (YoY) (Jun) | ** | - | 36.40% | Monthly |
| | Japan | 09:30 | BoJ's Governor Kuroda speech | *** | - | - | As Scheduled |
| | ИК | 12:00 | CBI Distributive Trades Survey - Realised (Jul) | * | 20.00% | 25.00% | Monthly |
| | US | 14:30 | Cap Goods Orders Nondef Ex Air (Jun) (P) | * | 0.60% | 0.10% | Monthly |
| | US | 14:30 | Cap Goods Ship Nondef Ex Air (Jun) (P) | * | | 1.10% | Monthly |
| | US | 14:30 | Durable Goods Orders (Jun) (P) | *** | 2.10% | 2.30% | Monthly |
| | US | 14:30 | Durable Goods Orders ex Transportation (Jun) (P) | ** | 0.80% | 0.30% | Monthly |
| | US | 14:55 | Redbook Index (YoY) (24-Jul) | e di \star 📩 | | 15.00% | Weekly |
| | US | 15:00 | Housing Price Index (MoM) (May) | 1 (j. 187 | | 1.80% | Monthly |
| | US | 16:00 | Consumer Confidence (Jul) | *** | 124.10 | 127.30 | Monthly |
| | US | 16:00 | Richmond Fed Manufacturing Index (Jul) | * | - | 22.00 | Monthly |

Note: ★★★ High ★★ Medium ★Low

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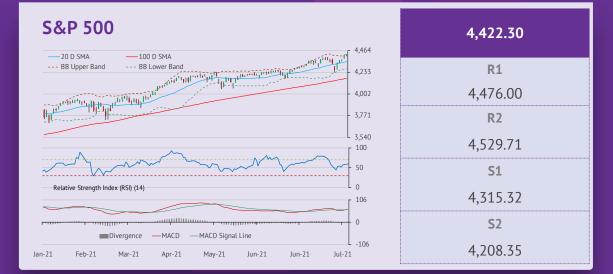


Technical snapshot

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| USD ZAR | 14.794 |
|---|---------------------------------|
| | ⁰⁶⁰ 452 R1 |
| Buyer Band BB Lower Band | 15.024 |
| | ²³⁷ R2 |
| | ⁶³⁰ 15.254 |
| m _ m _ m _ m _ m | S1 |
| Relative Strength Index (RSI) (14) | 14.5357 |
| | S2 |
| Divergence MACD MACD Signal Line Jan-21 Feb-21 Mar-21 Jun-21 Jun-21 | 3 14.276 |

Currencies & Commodities

Corporate & Global Economic News



| \$1,799.20/oz |
|---------------|
| R1 |
| \$1,820.37/oz |
| R2 |
| \$1,841.53/oz |
| S1 |
| \$1,783.57/oz |
| S2 |
| \$1,767.93/oz |



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