



ONE **Brief** Minute

7 JULY 2021



 Economic and Political News

Judgement in former President Jacob Zuma's application to stay his 15-month jail sentence reserved until Friday.

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Presidency receives Special Investigating Unit (SIU)'s final report on Digital Vibes contract.

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SA Municipal Workers' Union (Samwu) declares a pay dispute, threatens strike.

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Transnet investigates coal train line derailments.

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Police minister may face charges if he does not arrest Zuma by midnight.

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 **South Africa Market** ▼

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

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 65,849.75		▼ 59,756.87		▼ 13,049.09	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-317.11	-0.48	-325.33	-0.54	-19.29	-0.15
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.71	-0.60	-0.89	-0.67	0.55	-0.41
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-2.52	10.84	-2.62	9.89	-2.62	8.20

 **US Market** ▼

US markets closed mostly weaker yesterday, amid profit booking.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 4,343.54		▲ 14,663.64		▼ 34,577.37	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-8.80	-0.20	24.31	0.17	-208.98	-0.60
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.20	1.07	0.17	1.10	-0.60	0.22
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
2.22	15.64	5.49	13.77	-0.08	12.97

JSE All Share

S&P 500

 **Top Gainers**

Arrowhead Properties	8.8%	-14.2%
Allied Electronics Corp Ltd	7.6%	-5.3%
Liberty Two Degrees	5.1%	-3.5%
Massmart Holdings Ltd	4.0%	-3.3%
Metair Investments Ltd	3.7%	-3.1%

Top Losers 

Steinhoff International Holdings NV	
Famous Brands Ltd	
Alexander Forbes Group Holdings Ltd	
Hosken Consolidated Investments Ltd	
Glencore Plc	

 **Top Gainers**

Amazon.com Inc	4.7%	-7.0%
Generac Holdings Inc	3.4%	-6.5%
ABIOMED Inc	3.1%	-6.4%
Arista Networks Inc	2.6%	-6.3%
Extra Space Storage Inc	2.4%	-4.9%

Top Losers 

Diamondback Energy Inc
Halliburton Co
Occidental Petroleum Corp
NOV Inc
Schlumberger NV

 UK Market ▼

UK markets finished lower yesterday, amid strength in the British Pound and led by losses in commodity and banking sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 7,100.88		▼ 15,511.38		▼ 6,507.48	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-64.03	-0.89	-150.59	-0.96	-60.06	-0.91
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.31	0.90	-0.89	-0.13	-0.69	-0.01
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.21	9.91	0.71	13.07	0.94	17.22

 Asia Market ▼

Asian markets are trading mostly lower this morning, ahead of the US Federal Reserve's (Fed) meeting minutes. The Nikkei 225 Index is trading 0.9% lower at 28,389.40.

*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▼ 28,389.40		▲ 3,545.65		▼ 27,844.92	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-253.81	-0.89	15.39	0.44	-227.94	-0.81
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.49	-0.52	0.33	-1.70	-0.84	-2.62
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.24	4.37	-0.67	1.65	-1.11	3.09

FTSE 100

 Top Gainers

Informa Plc	2.3%	-4.6%
Segro Plc	1.6%	-4.2%
United Utilities Group Plc	1.6%	-4.2%
Avast Plc	1.5%	-4.0%
AVEVA Group	1.4%	-4.0%

Top Losers 

Antofagasta Plc	-4.6%
Ocado Group Plc	-4.2%
BP Plc	-4.2%
Evrast Plc	-4.0%
British Land Co Plc	-4.0%

Nikkei 225


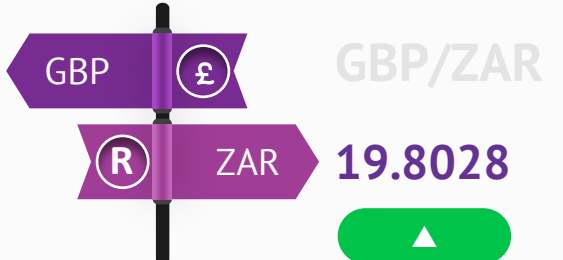
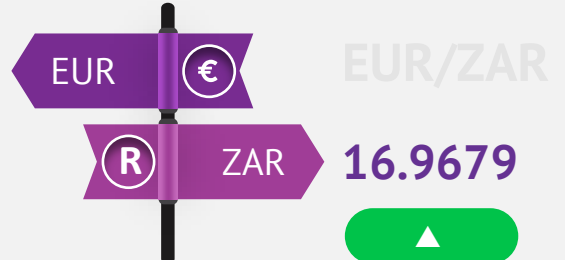

 Top Gainers

Yamato Holdings Co Ltd	3.3%	-5.5%
Z Holdings Corp	1.8%	-4.7%
CyberAgent Inc	1.6%	-3.8%
MINEBEA MITSUMI Inc	0.9%	-3.6%
Nippon Light Metal Holdings Co Ltd	0.6%	-3.5%





Top Losers 

Mitsui E&S Holdings Co Ltd	-5.5%
T&D Holdings Inc	-4.7%
Dai-ichi Life Holdings Inc	-3.8%
Amada Holdings Co Ltd	-3.6%
Shin-Etsu Chemical Co Ltd	-3.5%

 Currencies

 <p>USD/ZAR 14.3489</p> <p>▲</p> <p>At 06:00 SAST, the US Dollar retreated 0.22% against the South African Rand. The US Dollar rose against the South African Rand yesterday, ahead of the FOMC minutes.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.8028</p> <p>▲</p> <p>At 06:00 SAST, the British Pound is trading 0.20% weaker against the South African Rand. The British Pound climbed against the South African Rand yesterday, amid hopes surrounding Britain's reopening plans for 19 July.</p> <p>To Read More Click Here</p>	 <p>EUR/ZAR 16.9679</p> <p>▲</p> <p>At 06:00 SAST, the Euro fell 0.24% against the South African Rand. The Euro strengthened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.7509</p> <p>▲</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.24% lower against the South African Rand. The Australian Dollar gained against the South African Rand yesterday.</p>
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 Commodities

 <p>Brent (\$/barrel) 74.46</p> <p>▼ -0.09%</p> <p>At 06:00 SAST, Brent crude oil declined. Yesterday, Brent crude oil dropped, after OPEC and its allies postponed the meeting indefinitely following failure to agree on production policy.</p> <p>To Read More Click Here</p>	 <p>Gold (\$/oz) 1,800.80</p> <p>▲ 0.37%</p> <p>At 06:00 SAST, gold prices edged higher. Yesterday, Brent crude oil dropped, after the OPEC and its allies indefinitely postponed their meet following a failure to agree on production policy.</p> <p>To Read More Click Here</p>	 <p>Platinum (\$/oz) 1,081.90</p> <p>▬ 0.00%</p> <p>At 06:00 SAST, platinum prices remained unchanged. Yesterday, platinum prices dropped.</p>	 <p>Copper (\$/MT)* 9,281.04</p> <p>Yesterday, copper prices have fallen. * As of previous close</p>
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Major South African Corporate News

AngloGold Ashanti Limited

Appointed Alberto Calderon as Chief Executive Officer, with effect from 1 September 2021.

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Brimstone Investment Corp Ltd

Expects 1H21 EPS to be at least 22.30c, compared to a basic loss per share of 74.40c in the same previous period.

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Major Global Economic News



US

The ISM services index fell in June.
The Markit services PMI dropped in June.



Eurozone

Eurozone's ZEW economic sentiment index dropped in July.
Eurozone's retail sales rose more than expected in May.
Germany's factory orders unexpectedly fell in May.
Germany's ZEW economic sentiment index fell to a 6-month low level in July.



Asia













Australia's AiG performance of services index dropped in June.
The Reserve Bank of Australia (RBA) kept its key interest rate unchanged at 0.10%, as widely expected.



UK

Construction activity grew at its fastest pace since 1997 in June.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus	Previous	Frequency
 Japan	07:00	Coincident Index (May) (P)	★	-	95.30	Monthly
 Japan	07:00	Leading Economic Index (May) (P)	★★★	-	103.80	Monthly
 Germany	08:00	Industrial Production s.a. (MoM) (May)	★★★	0.50%	-1.00%	Monthly
 South Africa	08:00	Gross Gold & Forex Reserves (Jun)	★	-	USD54.14bn	Monthly
 South Africa	08:00	Net Gold & Forex Reserves (Jun)	★	-	USD52.24bn	Monthly
 France	08:45	Current Account (May)	★★	-	-EUR1.40bn	Monthly
 France	08:45	Trade Balance (May)	★★★	-	-EUR6.24bn	Monthly
 Italy	10:00	Retail Sales n.s.a. (YoY) (May)	★★	-	30.40%	Monthly
 Italy	10:00	Retail Sales s.a. (MoM) (May)	★★★	-	-0.40%	Monthly
 US	13:00	MBA Mortgage Applications (02-Jul)	★	-	-6.90%	Weekly
 Canada	16:00	Ivey PMI n.s.a. (Jun)	★★	-	59.80	Monthly
 US	16:00	JOLTs Job Openings (May)	★	-	9,286.00K	Monthly

Note: ★★★ High ★★ Medium ★ Low

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