



# ONE **Brief** Minute

9 JULY 2021



 Economic and Political News

**Former President Jacob Zuma to be eligible for parole after around 4 months, says justice minister.**

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**High Court to rule on ANC secretary-general Ace Magashule's suspension.**

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**State Security Agency (SSA) suspends Robert McBride head of the spy agency's foreign branch.**

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**ZAR1.2bn corruption case against four former Gauteng health dept officials postponed.**

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**SA excess deaths at six-month high as Delta spreads.**

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 South Africa Market ▼


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

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 65,243.50		▼ 59,106.40		▼ 13,111.90	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-1,562.86	-2.34	-1,599.17	-2.63	-55.08	-0.42
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-1.63	-1.52	-1.97	-1.75	1.03	0.07
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-2.52	9.82	-2.62	8.69	-2.62	8.72

 US Market ▼

US markets closed weaker yesterday, amid renewed concerns over global economic recovery.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 4,320.82		▼ 14,559.79		▼ 34,421.93	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-37.31	-0.86	-105.27	-0.72	-259.86	-0.75
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.72	0.54	-0.54	0.38	-1.05	-0.23
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
2.22	15.04	5.49	12.97	-0.08	12.47

JSE All Share

S&P 500

 Top Gainers

Imperial Logistics Ltd	33.7%	-8.4%
Cashbuild Ltd	3.7%	-7.4%
Brait Plc	3.4%	-7.3%
Vukile Property Fund Ltd	3.1%	-6.3%
Omnia Holdings Ltd	3.0%	-5.6%

Top Losers 

Northam Platinum Ltd	-8.4%
MultiChoice Group	-7.4%
Impala Platinum Holdings Ltd	-7.3%
Anglo American Platinum Ltd	-6.3%
Sibanye Stillwater Ltd	-5.6%

 Top Gainers

Biogen Inc	3.9%	-7.9%
Ball Corp	3.0%	-7.2%
Cabot Oil & Gas Corp	2.3%	-6.2%
Boeing Co	2.2%	-4.4%
MarketAxess Holdings Inc	2.0%	-4.4%

Top Losers 

Kansas City Southern	-7.9%
Norfolk Southern Corp	-7.2%
CSX Corp	-6.2%
Union Pacific Corp	-4.4%
PulteGroup Inc	-4.4%

 UK Market ▼

UK markets finished lower yesterday, led by losses in financial and mining sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 7,030.66		▼ 15,420.64		▼ 6,396.73	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-120.36	-1.68	-272.07	-1.73	-130.99	-2.01
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-1.30	-0.10	-1.47	-0.71	-2.38	-1.71
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.21	8.82	0.71	12.41	0.94	15.23

 Asia Market ▼

Asian markets are trading mostly lower this morning, amid worries over surging Covid-19 Delta variant cases. The Nikkei 225 Index is trading 1.7% lower at 27,640.85.

\*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▼ 27,640.85		▼ 3,501.16		▲ 27,339.42	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-477.18	-1.70	-24.34	-0.69	186.29	0.69
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-2.31	-2.34	0.19	-1.83	-4.09	-5.81
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.24	2.46	-0.67	1.51	-1.11	-0.29

FTSE 100

 Top Gainers

BAE Systems Plc	0.8%	-5.1%
Entain Plc	0.7%	-5.0%
Croda International Plc	0.7%	-4.8%
Royal Dutch Shell Plc –Class A	0.6%	-4.3%
International Consolidated Airlines Group	0.3%	-4.1%

Top Losers 

Intermediate Capital Group Plc
B&M European Value Retail SA
Persimmon Plc
JD Sports Fashion Plc
Anglo American Plc

Nikkei 225


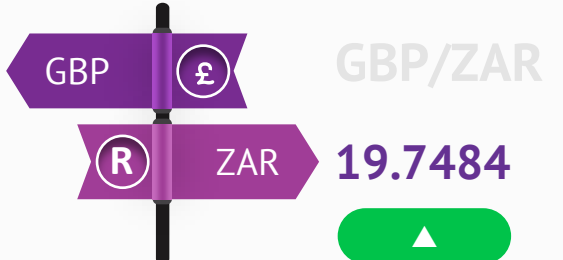
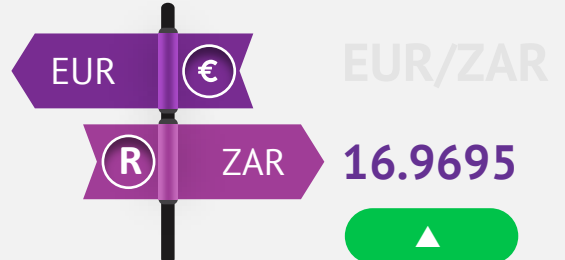

 Top Gainers

Eisai Co Ltd	0.6%	-5.1%
Inpex Corp	0.3%	-4.5%
SKY Perfect JSAT Holdings Inc	0.3%	-4.5%
J Front Retailing Co Ltd	0.1%	-4.4%
		-4.4%





Top Losers 

Kawasaki Kisen Kaisha Ltd
Taiyo Yuden Co Ltd
Yaskawa Electric Corp
Suzuki Motor Corp
Kyowa Hakko Kirin Co Ltd

 Currencies

 <p><b>USD/ZAR</b> 14.3335</p> <p>▲</p> <p>At 06:00 SAST, the US Dollar marginally retreated against the South African Rand. The US Dollar rose against the South African Rand yesterday.</p>	 <p><b>GBP/ZAR</b> 19.7484</p> <p>▲</p> <p>At 06:00 SAST, the British Pound is trading 0.12% weaker against the South African Rand. The British Pound climbed against the South African Rand yesterday.</p>	 <p><b>EUR/ZAR</b> 16.9695</p> <p>▲</p> <p>At 06:00 SAST, the Euro fell 0.10% against the South African Rand. The Euro strengthened against the South African Rand yesterday, after the ECB set a new inflation target.</p> <p>To Read More <a href="#">Click Here</a></p>	 <p><b>AUD/ZAR</b> 10.6390</p> <p>▲</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.17% lower against the South African Rand. The Australian Dollar dropped against the South African Rand yesterday.</p>
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 Commodities

 <p>▼ -0.07%</p> <p><b>Brent (\$/barrel)</b> 74.07</p> <p>At 06:00 SAST, Brent crude oil declined. Yesterday, Brent crude oil climbed, after the US Energy Information Administration (EIA) reported that crude oil inventories fell by 6.9mn bls to 445.5mn bls in the week ended 02 July 2021.</p> <p>To Read More <a href="#">Click Here</a></p>	 <p>▲ 0.29%</p> <p><b>Gold (\$/oz)</b> 1,805.40</p> <p>At 06:00 SAST, gold prices edged higher amid weakness in the US Dollar and drop in the US bond yields. Yesterday, gold prices fell.</p> <p>To Read More <a href="#">Click Here</a></p>	 <p>▼ -0.06%</p> <p><b>Platinum (\$/oz)</b> 1,072.60</p> <p>At 06:00 SAST, platinum prices declined. Yesterday, platinum prices dropped.</p>	 <p><b>Copper (\$/MT)*</b> 9,287.50</p> <p>Yesterday, copper prices have fallen. * As of previous close</p>
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## Major South African Corporate News

### Imperial Logistics Limited

Performance and strategic progress in the FY21 have been better than expected.

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## Major Global Economic News



### US

Consumer credit advanced more than expected in May.

Initial jobless claims unexpectedly rose in the week ended 02 July 2021.



### Eurozone

Germany's current account surplus narrowed in May.

Germany's trade surplus narrowed in May.

The European Central Bank (ECB) revised its inflation target to 2% on a symmetric basis.















### Asia

China's consumer price index (CPI) rose in June.

China's producer price index (PPI) climbed as expected in June.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 China	03:30	CPI (YoY) (Jun)	★★★	1.10%*	1.30%	Monthly
 China	03:30	PPI (YoY) (Jun)	★★★	8.80%*	9.00%	Monthly
 UK	08:00	Construction Output s.a. (MoM) (May)	★	-	-2.00%	Monthly
 UK	08:00	Gross Domestic Product s.a. (MoM) (May)	★	-	2.30%	Monthly
 UK	08:00	Index of Services (MoM) (May)	★	-	3.40%	Monthly
 UK	08:00	Industrial Production (MoM) (May)	★	1.50%	-1.30%	Monthly
 UK	08:00	Manufacturing Production (MoM) (May)	★	-	-0.30%	Monthly
 UK	08:00	Total Trade Balance (May)	★	-	-GBP0.94bn	Monthly
 France	08:45	Manufacturing Production (MoM) (May)	★★★	-	-0.30%	Monthly
 Italy	10:00	Industrial Production s.a. (MoM) (May)	★★	0.50%	1.80%	Monthly
 US	16:00	Wholesale Inventories (MoM) (May) (F)	★★★	1.10%	1.00%	Monthly
 US	19:00	Baker Hughes US Oil Rig Count (09-Jul)	★	-	372.00	Weekly

Note: ★★★ High ★★ Medium ★ Low

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