



ONE **Brief** Minute

12 JULY 2021



 Economic and Political News

South Africa (SA) extends level 4 lockdown for another 14 days with certain relaxations.

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High Court dismisses ANC secretary general, Ace Magashule's application to set aside his suspension.

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Pietermaritzburg High Court rejects Jacob Zuma's bid to delay sentence.

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SA to produce 17mn Covid-19 vaccines in next three months.

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Bosasa liquidators want ANC to repay ZAR3.6mn the company donated for 2014 national elections.

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 **South Africa Market** ▲

South African markets closed in the green on Friday, boosted by gains in resources and banking sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 66,385.57		▲ 60,221.84		▲ 13,303.37	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
1,142.07	1.75	1,115.44	1.89	191.47	1.46
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	0.21	NA	0.10	NA	1.53
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-2.52	11.74	-2.62	10.74	-2.62	10.31

 **US Market** ▲

US markets closed firmer on Friday, led by gains in financial and energy sector stocks.

S&P 500 futures ▼

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,369.55		▲ 14,701.92		▲ 34,870.16	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
48.73	1.13	142.13	0.98	448.23	1.30
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	1.68	NA	1.36	NA	1.07
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
2.22	16.33	5.49	14.07	-0.08	13.93

JSE All Share

S&P 500

 **Top Gainers**

Long4Life Ltd	7.1%	-4.9%
Sasol Ltd	5.5%	-4.2%
Thungela Resources Ltd	5.0%	-4.0%
Anglo American Plc	4.9%	-2.6%
BHP Group Plc	4.9%	-2.6%

Top Losers 

Cashbuild Ltd
Brait Plc
DataTec Ltd
Pan African Resources Plc
Omnia Holdings Ltd

 **Top Gainers**

Discover Financial Services	6.2%	-3.0%
NOV Inc	6.0%	-1.4%
State Street Corp	5.7%	-1.2%
SVB Financial Group	5.6%	-1.1%
Capital One Financial Corp	5.3%	-1.0%

Top Losers 

Biogen Inc
Dexcom Inc
ResMed Inc
Baxter International Inc
Charter Communications Inc -Class A

 UK Market 

UK markets finished higher on Friday, buoyed by gains in mining and banking sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,121.88		▲ 15,687.93		▲ 6,529.42	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
91.22	1.30	267.29	1.73	132.69	2.07
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	1.20	NA	1.01	NA	0.33
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.21	10.24	0.71	14.35	0.94	17.62

 Asia Market 

Asian markets are trading higher this morning, tracking overnight gains on Wall Street. The Nikkei 225 Index is trading 2.2% higher at 28,553.79.

*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 28,553.79		▲ 3,556.93		▲ 27,503.69	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
613.37	2.20	32.84	0.93	159.15	0.58
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
NA	-2.96	NA	-1.87	NA	-5.15
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.24	1.81	-0.67	1.47	-1.11	0.42

FTSE 100

 Top Gainers

Evraz Plc	5.5%	-4.3%
BHP Group Plc	4.3%	-1.4%
Anglo American Plc	4.3%	-0.7%
Rio Tinto Plc	4.1%	-0.6%
Glencore Plc	3.8%	-0.5%

Top Losers 

Just Eat Takeaway.com NV	
Rentokil Initial Plc	
B&M European Value Retail SA	
Avast Plc	
Reckitt Benckiser Group Plc	

Nikkei 225


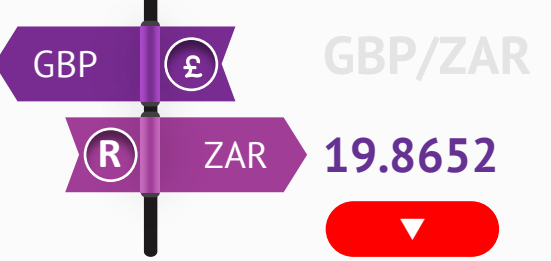


 Top Gainers

FANUC Corp	6.6%	-2.3%
Yaskawa Electric Corp	5.9%	-0.8%
Japan Steel Works Ltd	5.8%	-0.7%
Showa Denko KK	5.0%	-0.5%
OKUMA Corp	5.0%	-0.5%





Top Losers 

Eisai Co Ltd	
Kawasaki Kisen Kaisha Ltd	
Central Japan Railway Co	
ANA Holdings Inc	
West Japan Railway Co	

 Currencies

 <p>USD/ZAR 14.3060</p> <p>▼</p> <p>At 06:00 SAST, the US Dollar advanced 0.62% against the South African Rand. The US Dollar fell against the South African Rand on Friday, as risk appetite returned among investors.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.8652</p> <p>▼</p> <p>At 06:00 SAST, the British Pound is trading 0.50% higher against the South African Rand. The British Pound declined against the South African Rand on Friday, following weaker than expected GDP data.</p> <p>To Read More Click Here</p>	 <p>EUR/ZAR 16.9776</p> <p>▼</p> <p>At 06:00 SAST, the Euro rose 0.62% against the South African Rand. The Euro weakened against the South African Rand on Friday.</p> <p>To Read More Click Here</p>	 <p>AUD/ZAR 10.6861</p> <p>▼</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.38% firmer against the South African Rand. The Australian Dollar dropped against the South African Rand on Friday.</p> <p>To Read More Click Here</p>
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 Commodities

 <p>Brent (\$/barrel) 75.41</p> <p>▼ -0.19%</p> <p>At 06:00 SAST, Brent crude oil declined. On Friday, Brent crude oil climbed, amid signs of demand from both China and India. Meanwhile, Baker Hughes reported that US oil rig count rose by 2 to 378 last week.</p> <p>To Read More Click Here</p>	 <p>Gold (\$/oz) 1,803.20</p> <p>▼ -0.41%</p> <p>At 06:00 SAST, gold prices edged lower. On Friday, gold prices rose, amid weakness in the US Dollar and concerns over rising cases of the Delta variant.</p> <p>To Read More Click Here</p>	 <p>Platinum (\$/oz) 1,094.40</p> <p>▬ 0.00%</p> <p>At 06:00 SAST, platinum prices remained unchanged. On Friday, platinum prices advanced.</p> <p>To Read More Click Here</p>	 <p>Copper (\$/MT)* 9,482.25</p> <p>On Friday, copper prices have risen. * As of previous close</p>
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Major South African Corporate News

Ascendis Health Limited

Entered into a Restructuring Support Agreement, which provides a framework for the implementation of the Group Recapitalisation.

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Imperial Logistics Limited

DP World Logistics has made an offer to acquire 100% stake in the company.

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Major Global Economic News



US

The Federal Reserve (Fed) has pledged to provide “powerful support” to the US economy.



Eurozone

The European Central Bank (ECB) policymakers debated a cut in stimulus at their June meeting.

ECB President, Christine Lagarde, indicated that the bank will change its policy guidance at its next meeting.



Asia

Japan’s producer price index (PPI) climbed more than expected in June.



UK












Gross domestic product (GDP) advanced less than expected in May.

Total trade balance recorded a surplus in May.

Manufacturing production unexpectedly dropped in May.

Industrial production rose less than expected in May.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus	Previous	Frequency
 Japan	08:00	Machine Tool Orders (YoY) (Jun) (P)	★★★	-	141.90%	Monthly
 Switzerland	10:00	Domestic Sight Deposits (CHF) (09-Jul)	★	-	CHF632,800.00mn	Weekly
 Switzerland	10:00	Total Sight Deposits (CHF) (09-Jul)	★	-	CHF712,060.00mn	Weekly
 Portugal	12:00	Consumer Price Index (MoM) (Jun) (F)	★	-	0.24%	Monthly
 Portugal	12:00	Consumer Price Index (YoY) (Jun) (F)	★	-	1.20%	Monthly
 Portugal	12:00	Harmonized CPI (MoM) (Jun) (F)	★★	-	0.30%	Monthly
 Portugal	12:00	Harmonized CPI (YoY) (Jun) (F)	★	-	0.40%	Monthly
 South Africa	13:00	Manufacturing Production s.a. (MoM) (May)	★★	-	-1.20%	Monthly
 US	15:30	Fed's Williams speech	★	-	-	As Scheduled
 US	18:00	Fed's Kashkari speech	★★	-	-	As Scheduled
 US	18:00	USDA WASDE Report	★	-	-	As Scheduled

Note: ★★★ High ★★ Medium ★ Low

 40 best performers on the All Share Index

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
ArcelorMittal South Africa Ltd	535	1.71	2.29	435.00
Grindrod Shipping Holdings Ltd	16923	9.95	10.54	224.07
PPC Ltd	372	-2.36	-4.37	169.57
Texton Property Fund Ltd	326	1.24	0.31	126.39
MTN Group Ltd	10547	0.94	2.17	75.23
Distell Group Holdings Ltd	16575	-1.04	-0.75	74.40
RMB Holdings Ltd	144	2.13	2.86	73.18
Imperial Logistics Ltd	6330	34.85	33.49	72.62
Lewis Group Ltd	3632	5.15	7.14	72.04
Truworths International Ltd	6034	6.66	4.61	71.88
Royal Bafokeng Platinum Ltd	10663	1.55	4.47	71.65
Mpact Ltd	2375	-10.38	-8.65	71.48
Hudaco Industries Ltd	12939	3.50	1.24	66.36
Sasol Ltd	22250	1.66	2.06	66.13
Motus Holdings Ltd	9060	2.29	-2.94	64.87
Steinhoff International Holdings NV	171	-15.35	-9.52	64.42
Emira Property Fund Ltd	1000	5.82	1.52	59.93
Stadio Holdings Ltd	310	-1.59	0.32	58.97
Foschini Group Ltd/The	16149	2.40	1.54	57.84
Tsogo Sun Holdings Ltd	793	-0.88	-0.25	55.49
Pepkor Holdings Ltd	2097	1.80	4.02	53.85

Company Name	Last Close	1Week % Change	MTD % Change	YTD % Change
Invicta Holdings Ltd	2645	0.53	-2.22	53.33
Investec PLC	5730	-0.03	0.33	52.19
Dis-Chem Pharmacies Ltd	3165	1.28	-1.56	52.17
Vukile Property Fund Ltd	1208	3.51	4.95	51.00
Investec Ltd	5512	1.21	1.10	50.44
Advtech Ltd	1400	-0.92	-1.75	49.57
Massmart Holdings Ltd	6280	-0.54	-0.32	49.45
Sun International Ltd/South Africa	1850	-1.60	1.59	49.43
Transaction Capital Ltd	3658	-4.47	-3.28	47.73
Hammerson PLC	761	-0.39	2.56	47.18
Telkom SA SOC Ltd	4514	2.59	-2.65	46.99
Afrimat Ltd	6150	4.24	5.13	45.87
Reunert Ltd	4928	-0.65	-2.84	44.76
Attacq Ltd	714	10.53	4.08	43.66
City Lodge Hotels Ltd	357	-0.28	1.71	42.80
Exxaro Resources Ltd	17757	5.94	5.43	42.21
MAS Real Estate Inc	1798	3.93	-1.10	41.02
Octodec Investments Ltd	929	10.73	6.05	39.79
Woolworths Holdings Ltd/South Africa	5511	2.06	2.23	39.38
JSE All Share Index	66386.0	0.09	0.21	11.74

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