



ONE **Brief** Minute

13 JULY 2021



 Economic and Political News

South Africa's (SA) manufacturing production declines 2.6% on a MoM basis in May, compared to a drop of 1.2% in April.



President Cyril Ramaphosa pledges to restore calm across SA.

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Former President Jacob Zuma argues he be released pending Constitutional Court decision.

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World Bank outlines plan for SA to speed up reforms.

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Eskom issues warning as powerful winter system approaches.

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 South Africa Market 

South African markets closed in the green yesterday, boosted by gains in precious metal, resources and industrial sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▲ 67,293.33		▲ 61,080.80		▲ 13,317.76	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
907.76	1.37	858.96	1.43	14.39	0.11
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
1.37	1.58	1.43	1.53	0.11	1.64
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-2.52	13.27	-2.62	12.32	-2.62	10.43

 US Market 

US markets closed firmer yesterday, ahead of second quarter earnings results and led by gains in banking sector stocks.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 4,384.63		▲ 14,733.24		▲ 34,996.18	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
15.08	0.35	31.32	0.21	126.02	0.36
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.35	2.03	0.21	1.58	0.36	1.43
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
2.22	16.73	5.49	14.32	-0.08	14.34

JSE All Share

S&P 500

 Top Gainers

Sun International Ltd	8.1%	-9.3%
Metair Investments Ltd	7.6%	-5.2%
Montauk Renewables Inc	5.8%	-3.7%
Famous Brands Ltd	5.8%	-3.5%
Raubex Group Ltd	5.8%	-3.2%

Top Losers 

Arrowhead Properties	-9.3%
African Rainbow Capital Investments Ltd	-5.2%
Equites Property Fund Ltd	-3.7%
Emira Property Fund Ltd	-3.5%
SA Corporate Real Estate Ltd	-3.2%

 Top Gainers

Albemarle Corp	6.8%	-2.8%
Tesla Inc	4.4%	-2.6%
L Brands Inc	4.2%	-2.5%
Walt Disney Co	4.2%	-2.3%
Discover Financial Services	3.4%	-2.0%

Top Losers 

HP Inc	-2.8%
Biogen Inc	-2.6%
F5 Networks Inc	-2.5%
Charter Communications Inc –Class A	-2.3%
Akamai Technologies Inc	-2.0%

 UK Market 

UK markets finished higher yesterday, buoyed by gains in insurance and property sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,125.42		▲ 15,790.51		▲ 6,559.25	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
3.54	0.05	102.58	0.65	29.83	0.46
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.05	1.25	0.65	1.67	0.46	0.79
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.21	10.29	0.71	15.10	0.94	18.15

 Asia Market 

Asian markets are trading higher this morning, tracking overnight gains on Wall Street. The Nikkei 225 Index is trading 0.7% higher at 28,760.95.

*As at 6:00 SAST

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Nikkei 225* (JPY)		Shanghai Composite* (CNY)		Hang Seng* (HKD)	
▲ 28,760.95		▲ 3,556.28		▲ 28,013.82	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
191.93	0.67	8.44	0.24	498.58	1.81
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
2.25	-0.77	0.67	-1.21	0.62	-4.55
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
-0.24	4.10	-0.67	2.15	-1.11	1.04

FTSE 100

 Top Gainers

Admiral Group Plc	3.9%	-5.2%
B&M European Value Retail SA	2.2%	-4.2%
Natwest Group Plc	2.2%	-3.1%
Ocado Group Plc	1.6%	-2.9%
Experian Plc	1.6%	-2.6%

Top Losers 

Rolls-Royce Holdings Plc	-5.2%
International Consolidated Airlines Group	-4.2%
Whitbread Plc	-3.1%
Associated British Foods Plc	-2.9%
Compass Group Plc	-2.6%

Nikkei 225



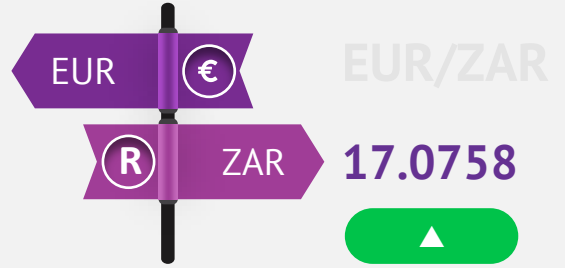

 Top Gainers

Unitika Ltd	4.8%	-4.1%
Inpex Corp	3.7%	-1.8%
Amada Holdings Co Ltd	3.6%	-1.3%
Citizen Watch Co Ltd	3.1%	-1.3%
Kawasaki Kisen Kaisha Ltd	3.0%	-1.0%





Top Losers 

SCREEN Holdings Co Ltd	-4.1%
Kyowa Hakko Kirin Co Ltd	-1.8%
Advantest Corp	-1.3%
Yamato Holdings Co Ltd	-1.3%
Keisei Electric Railway Co Ltd	-1.0%

 Currencies

 <p>USD/ZAR 14.3853</p> <p>▲</p> <p>At 06:00 SAST, the US Dollar retreated 0.12% against the South African Rand. The US Dollar rose against the South African Rand yesterday, as concerns over rising Delta variant infections increased demand for the safe haven asset.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.9925</p> <p>▼</p> <p>At 06:00 SAST, the British Pound is trading marginally higher against the South African Rand. The British Pound climbed against the South African Rand yesterday.</p>	 <p>EUR/ZAR 17.0758</p> <p>▲</p> <p>At 06:00 SAST, the Euro slightly fell against the South African Rand. The Euro strengthened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.7824</p> <p>▼</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.12% firmer against the South African Rand. The Australian Dollar gained against the South African Rand yesterday.</p>
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 Commodities

 <p>▲ 0.24%</p> <p>Brent (\$/barrel) 75.34</p> <p>At 06:00 SAST, Brent crude oil rose. Yesterday, Brent crude oil dropped, amid renewed concerns over global economic recovery.</p> <p>To Read More Click Here</p>	 <p>▲ 0.20%</p> <p>Gold (\$/oz) 1,809.60</p> <p>At 06:00 SAST, gold prices edged higher. Yesterday, gold prices fell, amid strength in the US Dollar.</p> <p>To Read More Click Here</p>	 <p>▬ 0.00%</p> <p>Platinum (\$/oz) 1,121.70</p> <p>At 06:00 SAST, platinum prices remained unchanged. Yesterday, platinum prices advanced.</p>	 <p>Copper (\$/MT)* 9,374.75</p> <p>Yesterday, copper prices have fallen. * As of previous close</p>
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Major South African Corporate News

No News

Major Global Economic News



Asia

Australia's NAB business confidence index unexpectedly dropped in June.

Australia's NAB business conditions index fell more than expected in June.












China's trade surplus unexpectedly widened in June.



UK

The BRC like-for-like retail sales across all sectors advanced less than expected in June.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 UK	01:01	BRC Sales Like-For-Like (YoY) (Jun)	★	6.70%*	18.50%	Monthly
 China	04:00	Trade Balance (Jun)	★★	USD51.50bn*	USD45.53bn	Monthly
 Germany	08:00	Consumer Price Index (YoY) (Jun) (F)	★★★	2.30%	2.50%	Monthly
 France	08:45	Consumer Price Index (YoY) (Jun) (F)	★★★	1.50%	1.40%	Monthly
 South Africa	11:30	Gold Production (YoY) (May)	★	-	177.90%	Monthly
 South Africa	11:30	Mining Production (YoY) (May)	★★	-	116.50%	Monthly
 South Africa	11:30	Platinum Production (YoY) (May)	★	-	276.10%	Monthly
 US	12:00	NFIB Small Business Optimism (Jun)	★	-	99.60	Monthly
 US	14:30	Consumer Price Index (MoM) (Jun)	★★★	0.50%	0.60%	Monthly
 US	14:30	Consumer Price Index (YoY) (Jun)	★★★	4.90%	5.00%	Monthly
 US	20:00	Monthly Budget Statement (Jun)	★★★	-USD202.00bn	-USD132.00bn	Monthly

Note: ★★★ High ★★ Medium ★ Low

 Technical snapshot

JSE All Share

67,293.33

R1

68,012.38

R2

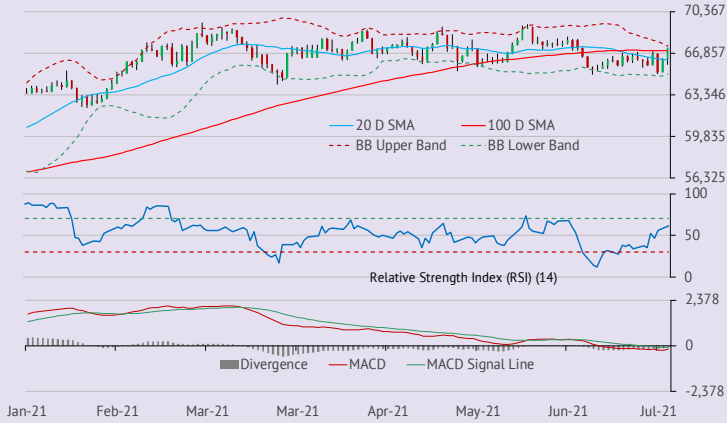
68,731.43

S1

65,855.23

S2

64,417.13



S&P 500

4,384.63

R1

4,417.75

R2

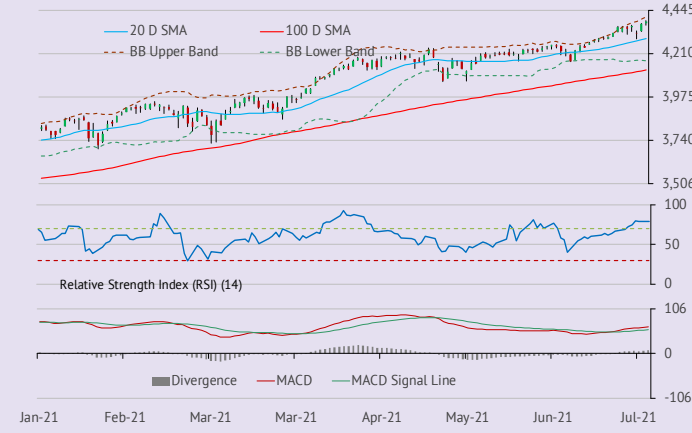
4,450.87

S1

4,320.44

S2

4,256.25



USD ZAR

14.4030

R1

14.5491

R2

14.6953

S1

14.2119

S2

14.0209



XAU USD

\$1,805.90/oz

R1

\$1,822.03/oz

R2

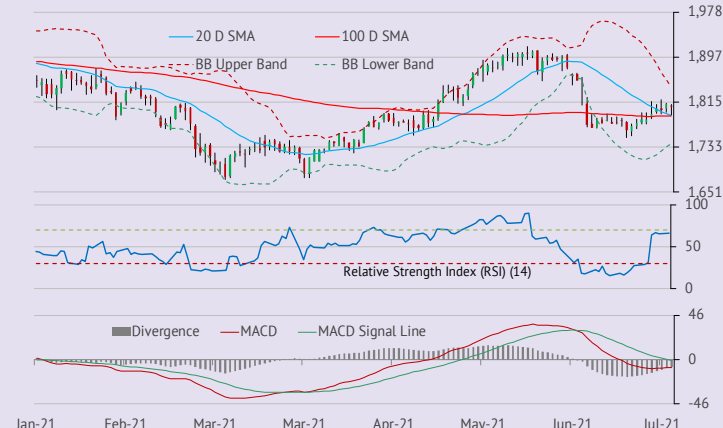
\$1,838.17/oz

S1

\$1,787.23/oz

S2

\$1,768.57/oz



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