



ONE **Brief** Minute

17 JUNE 2021



 Economic and Political News

President Cyril Ramaphosa moves SA back to level 3 of the lockdown.

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Democratic Alliance wants parliamentary inquiry into ‘slow vaccine rollout’.

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Eskom to directly distribute energy for debt-ridden municipalities, says David Mabuza.

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Mzwanele Manyi takes the reins as Jacob Zuma’s spokesman.

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Zondo Commission hears applications for leave to cross-examine witnesses.

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 **South Africa Market** ▼

South African markets closed in the red yesterday, amid spike in new infections and worries over strict lockdown restrictions.

*Values as on 15 June 2021

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JSE All Share* (ZAR)		JSE Top 40* (ZAR)		JSE Africa Fin. *(ZAR)	
▼ 67,310.57		▼ 61,061.79		▲ 13,596.25	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-630.91	-0.93	-591.96	-0.96	-124.25	-0.91
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.61	-0.96	-0.62	-1.17	-0.31	1.04
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
1.53	13.30	1.12	12.29	9.04	12.74

 **US Market** ▼

US markets closed weaker yesterday, after the US Federal Reserve (Fed) signalled higher interest rates into 2023, sooner than previously projected.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 4,223.70		▼ 14,039.68		▼ 34,033.67	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-22.89	-0.54	-33.18	-0.24	-265.66	-0.77
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.56	0.47	-0.21	2.12	-1.29	-1.44
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.55	12.45	-1.53	8.93	1.93	11.20

JSE All Share

S&P 500

 **Top Gainers**

As on 15 June 2021

Top Losers 

 **Top Gainers**

Top Losers 

Metair Investments Ltd	8.2%	-5.7%	Hammerson Plc
Pepkor Holdings Ltd	3.5%	-4.6%	Sappi Ltd
Thungela Resources Ltd	3.2%	-4.5%	Massmart Holdings Ltd
Astral Foods Ltd	2.8%	-4.1%	Anglo American Plc
British American Tobacco Plc	2.5%	-4.0%	RFG Holdings Ltd

Enphase Energy Inc	4.9%	-7.2%	Willis Towers Watson Plc
Occidental Petroleum Corp	4.6%	-5.6%	Oracle Corp
Centene Corp	3.7%	-3.9%	Take-Two Interactive Software Inc
SVB Financial Group	3.1%	-3.5%	Organon & Co
DISH Network Corp	2.7%	-3.2%	Snap-on Inc

 **UK Market** ▲

UK markets finished higher yesterday, supported by gains in industrial and defensive sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▲ 7,184.95		▼ 15,710.57		▲ 6,652.65	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
12.47	0.17	-18.95	-0.12	13.13	0.20
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.71	2.31	0.11	1.88	0.79	3.19
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.76	11.21	1.88	14.52	2.83	19.84

 **Asia Market** ▼

Asian markets are trading mostly lower this morning, tracking overnight losses on Wall Street. The Nikkei 225 Index is trading 1.2% lower at 28,951.97.

*As at 6:00 SAST

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Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▼ 28,951.97		▲ 3,524.31		▲ 28,514.70	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-339.04	-1.16	5.98	0.17	77.86	0.27
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
1.18	1.49	-1.99	-2.69	-1.41	-2.45
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.16	6.73	4.89	1.30	1.49	4.43

FTSE 100

 **Top Gainers**

Flutter Entertainment Plc	3.2%	-1.8%
Renishaw Plc	3.2%	-1.4%
Weir Group Plc/The	2.8%	-1.2%
Admiral Group Plc	2.6%	-1.2%
Bunzl Plc	2.2%	-1.2%

Top Losers 

Associated British Foods Plc	
Vodafone Group Plc	
Glencore Plc	
Anglo American Plc	
Barclays Plc	

Nikkei 225


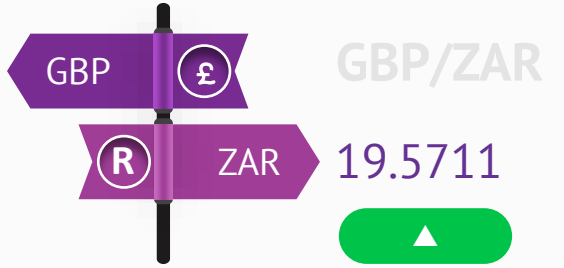
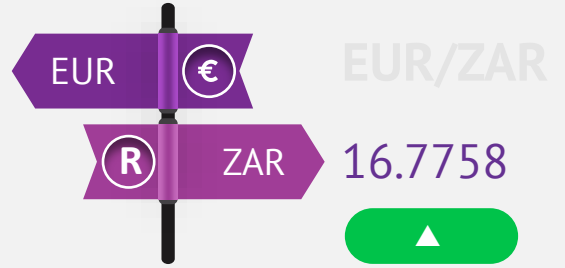

 **Top Gainers**

T&D Holdings Inc	3.3%	-5.3%
Dai-ichi Life Holdings Inc	3.2%	-3.7%
Mitsubishi Chemical Holdings Corp	2.5%	-3.5%
Z Holdings Corp	2.5%	-3.2%
Japan Exchange Group Inc	2.4%	-3.1%





Top Losers 

Komatsu Ltd	
M3 Inc	
Chugai Pharmaceutical Co Ltd	
Advantest Corp	
TDK Corp	

 Currencies

 <p>USD/ZAR 13.9854</p> <p>▲</p> <p>At 06:00 SAST, the US Dollar retreated 0.3% against the South African Rand. The US Dollar rose against the South African Rand yesterday, after the US Fed projected its first post-pandemic rate hikes into 2023.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.5711</p> <p>▲</p> <p>At 06:00 SAST, the British Pound is trading 0.2% weaker against the South African Rand. The British Pound climbed against the South African Rand yesterday, following a rise in UK consumer prices.</p> <p>To Read More Click Here</p>	 <p>EUR/ZAR 16.7758</p> <p>▲</p> <p>At 06:00 SAST, the Euro fell 0.3% against the South African Rand. The Euro strengthened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.6674</p> <p>▲</p> <p>At 06:00 SAST, the Australian Dollar is trading slightly lower against the South African Rand. The Australian Dollar gained against the South African Rand yesterday.</p>
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 Commodities

 <p>▼ -0.56% Brent (\$/barrel) 73.97</p> <p>At 06:00 SAST, Brent crude oil declined. Yesterday, Brent crude oil climbed, after the Energy Information Administration reported that crude inventories fell by 7.4mn bls in the week to 11 June.</p> <p>To Read More Click Here</p>	 <p>▼ -1.91% Gold (\$/oz) 1824.00</p> <p>At 06:00 SAST, gold prices edged lower, after the Fed signalled two rate hikes by 2023. Yesterday, gold prices rose.</p> <p>To Read More Click Here</p>	 <p>▼ -1.56% Platinum (\$/oz) 1124.10</p> <p>At 06:00 SAST, platinum prices dropped. Yesterday, platinum prices declined.</p>	 <p>Copper (\$/MT)* 9638.25</p> <p>Yesterday, copper prices have risen. * As of previous close</p>
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Major South African Corporate News

Mpact Limited

Announced that group revenue for 5M21 of ZAR4.8bn exceeded the prior period by 16%.

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Major Global Economic News



US

Fed officials hinted that interest rates will be increased to 0.6% in 2023.

Building permits fell in May.

Housing starts rebounded in May.

The MBA mortgage applications climbed in the week ended 11 June 2021.



UK

House price inflation slowed for the first time since July 2020 in April.

Consume price inflation exceeded the central bank's 2.0% target for the first time since mid-2019 in May.

The retail price rose in line with market expectations in May.



Asia













China industrial output, retail sales rose less than expected in May.

Australia's Westpac leading index fell in May.

Japan posted a merchandise trade deficit in May.

Australia's jobless rate declined in May.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus	Previous	Frequency
 Switzerland	08:00	Trade Balance s.a. (May)	★★	-	-CHF3.29bn	Monthly
 Switzerland	09:30	SNB Interest Rate Decision	★★★	-0.75%	-0.75%	As Scheduled
 Eurozone	11:00	Construction Output s.a. (MoM) (Apr)	★★★	-	2.70%	Monthly
 Eurozone	11:00	Consumer Price Index (YoY) (May) (F)	★★★	2.00%	1.60%	Monthly
 South Africa	11:30	Motor Trade Sales (MoM) (Apr)	★	-	2.90%	Monthly
 South Africa	13:00	Retail Sales (MoM) (Apr)	★★	-	-3.70%	Monthly
 South Africa	13:00	Retail Sales (QoQ) (Apr)	★	-	1.50%	Monthly
 US	14:30	Initial Jobless Claims (12-Jun)	★★★	359.00 K	376.00 K	Weekly
 US	14:30	Philadelphia Fed Manufacturing Survey (Jun)	★★	31.00	31.50	Monthly
 Eurozone	15:00	Eurogroup meeting	★★	-	-	As Scheduled
 US	16:00	Leading Economic Index (MoM) (May)	★★★	1.30%	1.60%	Monthly
 US	16:30	EIA Natural Gas Storage Change (11-Jun)	★★★	72.00 Bcf	98.00 Bcf	Weekly

Note: ★★★ High ★★ Medium ★ Low

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