



ONE **Brief** Minute

18 JUNE 2021



 Economic and Political News

SA's retail sales jump 95.8% on an annual basis in April, compared to a revised drop of 2.3% in March.

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South African Airways rejects unsolicited offer to repatriate funds worth ZAR350mn in Zimbabwe.

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Deputy chief justice Raymond Zondo seeks to extend inquiry again.

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SA 'close to securing vaccines' from China and Russia.

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Democratic Alliance asks Cabinet to reject amending Section 25 allowing land expropriation without compensation.

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 South Africa Market ▼

South African markets closed in the red yesterday, following the US Federal Reserve's (Fed) hawkish message and led by losses in banking and precious metal sector stocks.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 66,585.48		▼ 60,399.88		▼ 13,265.96	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-725.09	-1.08	-661.91	-1.08	-330.29	-2.43
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-1.68	-2.03	-1.70	-2.24	-2.73	-1.41
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
1.53	12.08	1.12	11.07	9.04	10.00

 US Market ▼

US markets closed mostly weaker yesterday, as investors reacted negatively to Fed's hawkish policy statement.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▼ 4,221.86		▲ 14,161.35		▼ 33,823.45	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-1.84	-0.04	121.67	0.87	-210.22	-0.62
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.60	0.42	0.65	3.00	-1.90	-2.04
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.55	12.40	-1.53	9.88	1.93	10.51

JSE All Share

S&P 500

 Top Gainers

Thungela Resources Ltd	13.4%	-7.6%
Bid Corp Ltd	4.5%	-7.6%
Aspen Pharmacare Holdings Ltd	4.2%	-6.8%
Naspers Ltd	2.8%	-6.4%
KAP Industrial Holdings Ltd	2.4%	-6.2%

Top Losers 

DRDGOLD Ltd	-7.6%
Metair Investments Ltd	-7.6%
Liberty Holdings Ltd	-6.8%
Gold Fields Ltd	-6.4%
Sibanye Stillwater Ltd	-6.2%

 Top Gainers

Enphase Energy Inc	6.6%	-7.6%
Advanced Micro Devices Inc	5.6%	-7.5%
Danaher Corp	5.0%	-7.4%
Xilinx Inc	4.9%	-7.1%
Paycom Software Inc	4.8%	-7.1%

Top Losers 

Occidental Petroleum Corp	-7.6%
DXC Technology Co	-7.5%
Regions Financial Corp	-7.4%
Lincoln National Corp	-7.1%
Unum Group	-7.1%

 UK Market ▼

UK markets finished lower yesterday, as mining sector stocks declined on the back of lower commodity prices.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 7,153.43		▲ 15,727.67		▲ 6,666.26	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-31.52	-0.44	17.10	0.11	13.61	0.20
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.27	1.86	0.22	1.99	0.99	3.40
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.76	10.73	1.88	14.64	2.83	20.08

 Asia Market ▲

Asian markets are trading mostly higher this morning. The Nikkei 225 Index is trading 0.2% higher at 29,066.97.

*As at 6:00 SAST

Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▲ 29,066.97		▼ 3,508.29		▲ 28,724.39	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
48.64	0.17	-17.31	-0.49	165.80	0.58
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.24	0.55	-1.79	-2.49	-0.98	-2.03
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
0.16	5.74	4.89	1.51	1.49	4.87

FTSE 100

 Top Gainers

BT Group Plc	2.7%	-4.5%	Halma Plc
Whitbread Plc	1.9%	-4.0%	Renishaw Plc
International Consolidated Airlines Group	1.9%	-3.6%	Glencore Plc
Pershing Square Holdings Ltd/Fund	1.8%	-3.4%	Anglo American Plc
Rolls-Royce Holdings Plc	1.8%	-3.4%	Fresnillo Plc

Top Losers 


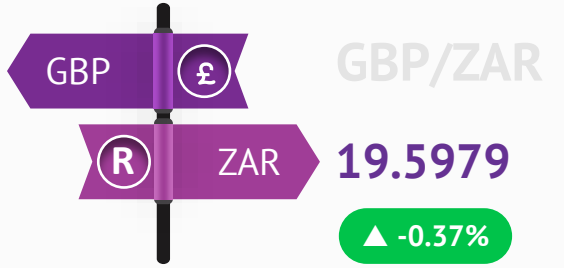
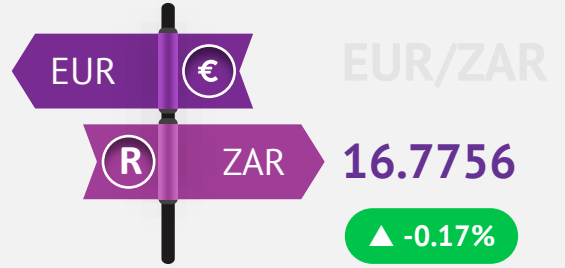

Nikkei 225

 Top Gainers

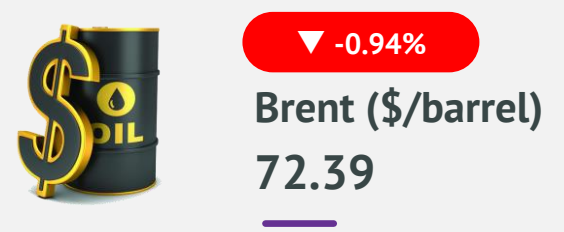
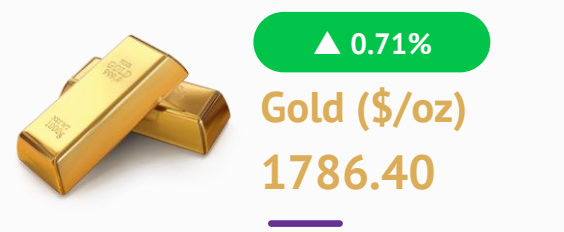
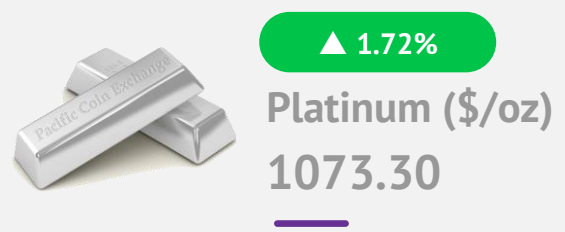

Eisai Co Ltd	10.4%	-7.5%	Nippon Yusen KK
SUMCO Corp	3.6%	-6.1%	Kawasaki Kisen Kaisha Ltd
CyberAgent Inc	2.9%	-5.9%	Mitsui OSK Lines Ltd
M3 Inc	2.8%	-4.9%	Dai-ichi Life Holdings Inc
Terumo Corp	2.7%	-4.8%	Sompo Holdings Inc

Top Losers 

 Currencies

 <p>USD/ZAR 14.0723 ▲</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, on Fed's rate hike projection.</p> <p>To Read More Click Here</p>	 <p>GBP/ZAR 19.5979 ▲ -0.37%</p> <p>At 06:00 SAST, the British Pound is trading 0.4% weaker against the South African Rand. The British Pound climbed against the South African Rand yesterday.</p>	 <p>EUR/ZAR 16.7756 ▲ -0.17%</p> <p>At 06:00 SAST, the Euro fell 0.2% against the South African Rand. The Euro weakened against the South African Rand yesterday.</p>	 <p>AUD/ZAR 10.6266 ▲ -0.41%</p> <p>At 06:00 SAST, the Australian Dollar is trading 0.4% lower against the South African Rand. The Australian Dollar dropped against the South African Rand yesterday.</p>
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 Commodities

 <p>Brent (\$/barrel) 72.39 ▼ -0.94%</p> <p>At 06:00 SAST, Brent crude oil declined. Yesterday, Brent crude oil dropped, amid strength in the greenback.</p> <p>To Read More Click Here</p>	 <p>Gold (\$/oz) 1786.40 ▲ 0.71%</p> <p>At 06:00 SAST, gold prices edged higher. Yesterday, gold prices fell, as the US dollar strengthened, following Fed's hawkish tone.</p> <p>To Read More Click Here</p>	 <p>Platinum (\$/oz) 1073.30 ▲ 1.72%</p> <p>At 06:00 SAST, platinum prices advanced. Yesterday, platinum prices declined.</p>	 <p>Copper (\$/MT)* 9289</p> <p>Yesterday, copper prices have fallen. * As of previous close</p>
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Major South African Corporate News

Imperial Logistics Limited

Announced that its subsidiary, Imperial Capital acquired Deep Catch Namibia for ZAR633.00mn.

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Invicta Holdings Limited

In its FY21 trading statement stated that profit is expected to increase between 138.0% and 143.0%.

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Major Global Economic News



US

The leading economic index jumped in line with expectations in May.

Initial jobless claims unexpectedly rose to its highest level in a month in the week ended 11 June 2021.

The Philadelphia Fed manufacturing index eased in June.



Eurozone

Eurozone's construction output declined in April.







Eurozone's consumer price inflation accelerated at its fastest pace since 2018 in May.



Asia

Japan's consumer price index fell in May.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 Japan	01:30	National CPI Ex Food, Energy (YoY) (May)	★★	-0.20%*	-0.20%	Monthly
 Japan	01:30	National Consumer Price Index (YoY) (May)	★★★	-0.10%*	-0.40%	Monthly
 Japan	05:00	BoJ Monetary Policy Statement	★★★	-	-	As Scheduled
 Germany	08:00	Producer Price Index (YoY) (May)	★★★	6.40%	5.20%	Monthly
 Japan	08:00	BoJ Press Conference	★★★	-	-	As Scheduled
 UK	08:00	Retail Sales (MoM) (May)	★	1.60%	9.20%	Monthly
 UK	08:00	Retail Sales (YoY) (May)	★	29.00%	42.40%	Monthly
 Eurozone	10:00	Current Account s.a (Apr)	★★★	-	EUR17.80bn	Monthly
 Eurozone	10:40	EcoFin Meeting	★	-	-	As Scheduled
 Canada	14:30	New Housing Price Index (MoM) (May)	★★	-	1.90%	Monthly
 Eurozone	14:30	Press conference following the video conference of economics and finance ministers	★	-	-	As Scheduled
 US	19:00	Baker Hughes US Oil Rig Count (18-Jun)	★	-	365.00	Weekly

Note: ★★★ High ★★ Medium ★ Low

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