

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	73909.47	73608.07	0.41	2.06	1.05	-3.88
Top 40	67678.68	67409.47	0.40	2.34	1.35	-3.99
Financial 15	16523.55	16473.67	0.30	-0.06	-4.18	-7.55
Industrial 25	103271.49	102301.33	0.95	3.07	0.53	-0.43
Resource 10	55660.98	55797.02	-0.24	3.90	10.52	-3.25
Mid Cap	76808.78	76784.83	0.03	0.48	1.48	-4.48
Small Cap	71321.02	71012.38	0.43	1.54	-0.59	-1.62
Banks	10057.92	10028.26	0.30	-0.29	-4.03	-8.13
Retailers	5885.45	5850.74	0.59	-0.54	-2.96	-5.58
Property (J253) - TR	1946.74	1945.93	0.04	1.48	0.09	4.46

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	39760.08	39282.33	1.22	0.63	2.02	5.49
Nasdaq	16399.52	16315.70	0.51	0.18	2.27	9.25
S&P 500	5248.49	5203.58	0.86	0.46	3.35	10.04
US VIX	12.78	13.24	-3.47	-1.99	-4.84	2.65

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	8204.81	8184.75	0.25	0.53	3.23	8.77
DAX 30	18477.09	18384.35	0.50	2.56	5.24	10.30
Eurostoxx 50	5081.74	5064.18	0.35	1.63	4.01	12.39
FTSE	7931.98	7930.96	0.01	2.52	3.24	2.57

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	16392.84	16618.32	-1.36	-0.91	-2.37	-3.84
Nikkei 225	40762.73	40398.03	0.90	1.90	3.88	21.81
Shanghai	2993.14	3031.48	-1.26	-2.81	-0.74	0.61

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	308.60	302.00	2.19	0.87	4.57	2.86
BHP AUS	4447.00	4368.00	1.81	0.00	-1.06	-13.35

NOTE : 5D% and 1M% are rolling percentage moves

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

TIME	AREA	TODAY'S EVENTS & RELEASES	PERIOD	EXP.	PREV.
8:00	ZA	M3 Money Supply y/y	Feb	6.10%	6.58%
8:00	ZA	Private Sector Credit y/y	Feb	3.30%	3.16%
14:30	US	GDP Growth Rate q/q Final	Q4	3.20%	4.90%
16:00	US	Pending Home Sales y/y	Feb	2.10%	-8.80%
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TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
15:00	ZA	Interest Rate Decision	---	8.25%	8.25%
15:00	ZA	Prime Overdraft Rate	---	11.75%	11.75%
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JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Metair Investments Ltd	MTA	1342	6.09	6.93	-24.39	
PPC Limited	PPC	347	5.79	6.12	-13.03	
Transaction Capital Ltd	TCP	878	4.77	9.75	10.03	
Sirius Real Estate Ltd	SRE	2306	4.39	4.72	4.11	
Pan African Resource plc	PAN	525	3.96	7.14	28.36	
Telkom SA SOC Ltd	TKG	3000	3.88	15.21	0.87	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Altron Limited A	AEL	1101	-4.59	0.09	7.41	
Tharisa plc	THA	1351	-3.84	8.51	-10.59	
Impala Platinum Hlgs Ltd	IMP	7617	-3.74	3.70	-16.54	
Anglo American Plat Ltd	AMS	75717	-3.69	3.17	-21.46	
Sibanye Stillwater Ltd	SSW	2055	-3.20	5.98	-17.47	

DIVIDEND DATA

COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
Mondi plc	MNP	46.67 EURc	Life Healthcare	LHC	600 ZARc
African Rainbow Minerals	ARI	600 ZARc	Grindrod	GND	38 ZARc
AECI	AFE	119 ZARc	Attacq	ATT	30 ZARc
Sanlam	SLM	400 ZARc	Sea Harvest Group	SHG	40 ZARc
Mpact	MPT	75 ZARc	Hammerson Plc	HMN	0.78 GBPP

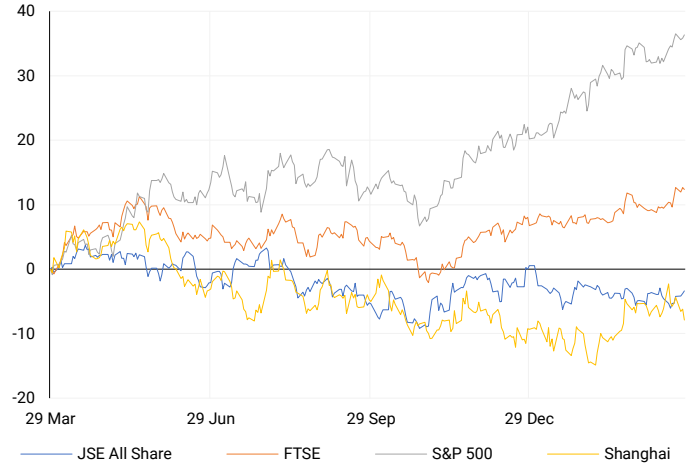
Last date to trade **Tue, 02 April**

SOURCES | JSE, IRESS, MONEYWEB, CNBC, BBC, CNN

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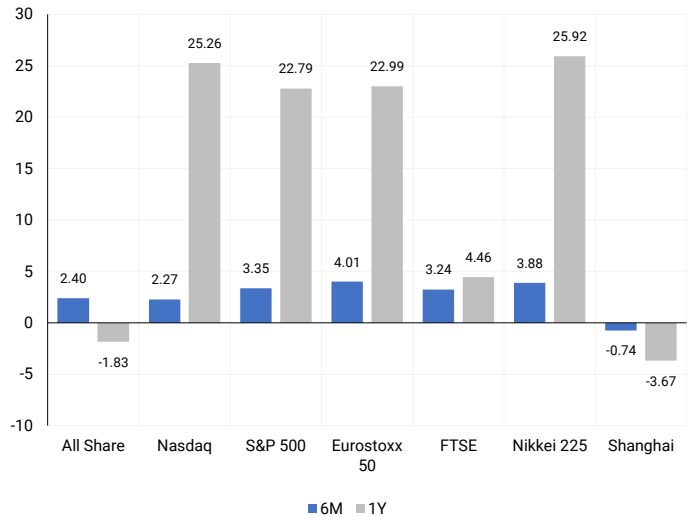
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



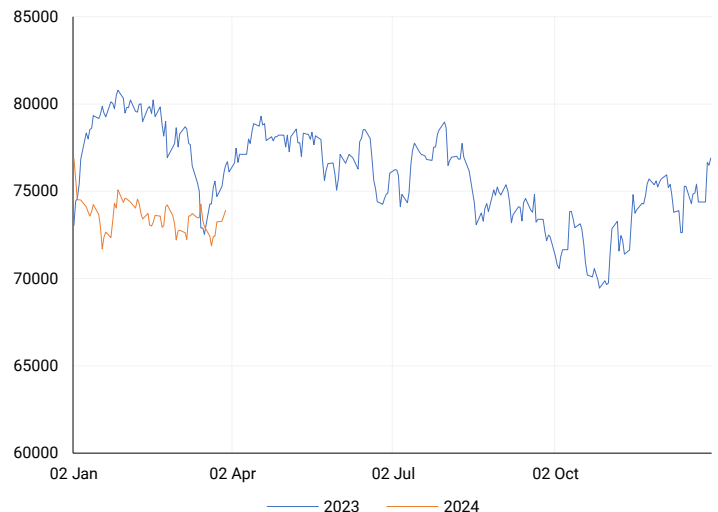
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



LOCAL EQUITIES | JSE LARGE CAP COMPANIES (Cents Per Share)

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	14829	14647	1.24	-1.42	-10.68	-9.42
Anglo American plc	45441	45817	-0.82	3.16	5.96	-4.03
Anglo American Plat Ltd	75717	78615	-3.69	3.17	2.75	-21.46
Anglogold Ashanti Ltd	41418	41032	0.94	6.73	15.55	17.20
Anheuser-Busch InBev SA NV	115350	114585	0.67	2.72	-3.99	-3.89
BHP Group Limited	53855	53597	0.48	0.96	-2.79	-14.98
BID Corporation Ltd	46422	46493	-0.15	1.61	3.16	8.81
British American Tob plc	56693	56639	0.10	1.97	-0.97	4.69
Compagnie Fin Richemont	284331	283100	0.43	-1.55	-4.58	10.74
Capitec Bank Hldgs Ltd	210600	211353	-0.36	2.28	4.73	3.93
Discovery Ltd	12403	12517	-0.91	-2.50	-8.80	-13.68
Firststrand Ltd	6107	6060	0.78	-2.23	-6.20	-16.92
Gold Fields Ltd	29387	29154	0.80	7.72	21.78	5.79
Glencore plc	10185	10190	-0.05	2.03	13.47	-8.78
Impala Platinum Hlgs Ltd	7617	7913	-3.74	3.70	13.84	-16.54
Kumba Iron Ore Ltd	45172	45841	-1.46	-4.15	-17.42	-26.52
Mondi plc	33503	33450	0.16	4.44	-0.53	-7.71
MTN Group Ltd	9399	9217	1.97	11.72	5.02	-18.62
Naspers Ltd -N-	330163	323558	2.04	5.96	1.55	5.55
Prosus N.V.	58950	58490	0.79	5.83	2.11	5.19
South32 Limited	3618	3569	1.37	-0.33	1.74	-14.25
Standard Bank Group Ltd	18494	18525	-0.17	-0.49	-9.75	-11.13
Shoprite Holdings Ltd	24750	24821	-0.29	-2.24	-4.31	-10.02
Sanlam Limited	7045	7048	-0.04	1.08	-1.81	-3.23
Sasol Limited	14030	14135	-0.74	-0.55	-5.77	-24.28
Sibanye Stillwater Ltd	2055	2123	-3.20	5.98	2.39	-17.47
Vodacom Group Ltd	9845	9713	1.36	6.65	5.60	-7.12

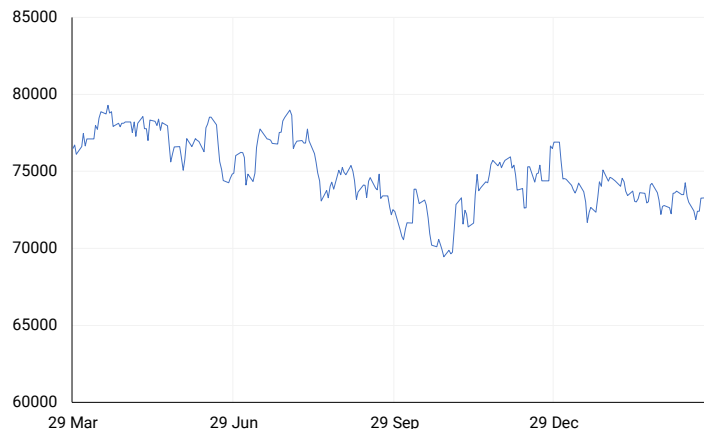
SOUTH AFRICAN MARKET SUMMARY

SELECTED ITEMS

The Top-40 index added 0.4% during the session yesterday. The South African Reserve Bank (SARB) decided to maintain the repo rate at 8.25%, emphasizing the need for a restrictive policy stance due to high inflation expectations, aligning with analysts' forecasts. South Africa's consumer inflation edged closer to the SARB's upper target of 6%, potentially delaying rate cuts this year. The SARB reiterated its preference for inflation to be between 3% and 6%, aiming for it to stabilize around the midpoint before considering rate adjustments.

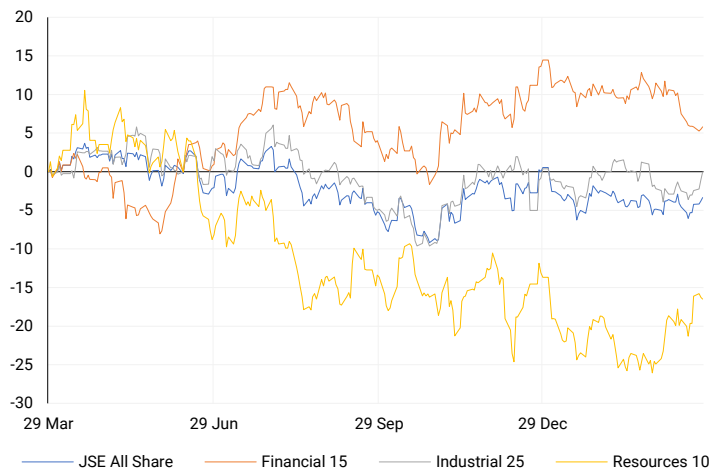
JSE TOP 40

One-year



LOCAL INDICES

Normalised percentage performances



EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
Bell	BEL	Final	29 Mar'24
TeleMasters	TLM	Interim	30 Mar'24
Eastern Platinum	EPS	Final	11 Apr'24
PSG	KST	Final	12 Apr'24
Capitec	CPI	Final	23 Apr'24

BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	8750	10.69	Thu, 06 Jun '24
Standard Bank	SBPP	8660	11.08	Thu, 28 Mar '24
Absa	ABSP	77300	11.18	Thu, 18 Apr '24
Capitec	CPIP	10198	10.15	Thu, 14 Mar '24
Steinhoff	SHFF	9495	12.21	Thu, 18 Apr '24
Grindrod	GNDP	9399	11.97	Thu, 21 Mar '24
Netcare	NTCP	8463	12.00	Thu, 09 May '24
Discovery	DSBP	9850	12.43	Thu, 07 Mar '24
Invicta	IVTP	9850	12.36	Thu, 27 Jun '24

LOCAL SENS ANNOUNCEMENTS

SELECTED RELEASE

DATATEC LIMITED – Trading Update

In the trading update for the year ending February 29, 2024, the group anticipates a total revenue of about US\$5.44 billion, a 5.8% rise compared to the previous year's US\$5.14 billion. The approximate breakdown of divisional revenues for FY24 is as follows: Westcon International expects US\$3.68 billion (a 7.6% increase from FY23's US\$3.42 billion), Logicalis International foresees US\$1.25 billion (a 1.5% increase from FY23's US\$1.23 billion), and Logicalis Latin America anticipates US\$510 million (a 3.9% increase from FY23's US\$491 million).

DTC | -0.53% OPEN | 3797c HIGH | 3835c LOW | 3776c CLOSE | 3776c TIME | 08:00

MOMENTUM METROPOLITAN HOLDINGS LIMITED – Unaudited Interim Results

In the first half of 2024, there were notable financial shifts compared to the same period in 2023. Earnings rose to R2191 million from R2060 million, reflecting a 6% increase, while headline earnings surged by 42% to R2191 million from R1540 million. Operating profit notably increased by 69% to R2025 million from R1195 million, despite a 22% decrease in investment return to R399 million from R509 million. Earnings per share increased by 11% to 159.9 cents from 144.5 cents, and headline earnings per share soared by 48% to 159.9 cents from 108.0 cents. Additionally, the interim dividend per share increased to 60 cents from 50 cents, marking a 20% rise. The present value of new business premiums (PVNBP) increased by 18% to R39103 million from R33268 million, although the value of new business (VNB) decreased by 38% to R200 million from R324 million. The diluted embedded value per share rose to R35.01 from R31.39, indicating a 12% increase, while the return on embedded value per share decreased to 12.0% from 15.6%. Finally, the return on equity improved to 17.8% from 15.5%.

MTM | 1.13% OPEN | 2033c HIGH | 2081c LOW | 2033c CLOSE | 2053c TIME | 07:10

AFRICAN AND OVERSEAS ENTERPRISES LIMITED – Unaudited Condensed Consolidated Financial Results

In 2023, there were mixed financial results compared to 2022. While revenue increased slightly by 2.0% to R480.0 million from R470.8 million, the gross profit margin percentage decreased to 46.5% from 48.5% in 2022. Operating profit saw a significant decline of 60.1%, dropping to R40.9 million from R102.5 million in 2022. Earnings per share and headline earnings per share both experienced a sharp decrease of 72.3%, falling to 76.3 cents and 76.5 cents, respectively, from 275.9 cents in 2022. On a positive note, net asset value per share increased by 11.3% to R19.62 from R17.62 in 2022. However, no ordinary dividend per share was paid in 2023, similar to 2022.

A00 | 0.00% OPEN | 1625c HIGH | 1625c LOW | 1625c CLOSE | 1625c TIME | 17:00

LOCAL EQUITIES | JSE MID CAP COMPANIES (Cents Per Share)

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmacare Hldgs Ltd	APN	21850	21875	-0.11	13.15	7.37
African Rainbow Min Ltd	ARI	16040	16049	-0.06	-6.67	-19.80
AVI Ltd	AVI	9125	9110	0.16	3.19	11.19
Barloworld Ltd	BAW	6139	6008	2.18	-9.72	-22.29
Bidvest Ltd	BVT	24350	24153	0.82	5.23	-3.48
Bytes Technology Grp PLC	BYI	12250	12389	-1.12	-4.94	-14.46
Capital&Counties Prop plc	CCO	3371	3447	-2.20	12.37	3.72
Clicks Group Ltd	CLS	29500	29574	-0.25	-1.16	-9.43
Dis-Chem Pharmacies Ltd	DCP	3238	3250	-0.37	5.89	5.51
Distell Group Hldgs Ltd	DGH	94	94	0.00	-0.53	9.30
Exaro Resources Ltd	EXX	16724	17215	-2.85	-8.41	-18.21
Fortress Real Est INV A	FFA	18.84	18.64	1.07	1.13	-98.64
Fortress Real Est INV B	FFB	1580	1578	0.13	-3.36	122.54
Growthpoint Prop Ltd	GRT	1130	1142	-1.05	-4.07	-3.25
Harmony GM Co Ltd	HAR	15315	15077	1.58	40.87	28.06
Hammerson plc	HMN	668	651	2.61	6.88	-1.76
Investec Ltd	INL	12626	12421	1.65	5.63	0.53
Investec plc	INP	12634	12481	1.23	4.67	0.31
Italtile Ltd	ITE	981	1000	-1.90	-10.00	-12.41
Life Healthc Grp Hldgs Ltd	LHC	1713	1674	2.33	-2.06	-6.75
MultiChoice Group Ltd	MCG	11261	10880	3.50	7.92	38.99
Mediclinic Int plc	MEI	24	23.5	2.13	37.14	-7.69
Montauk Renewables Inc	MKR	7300	7462	-2.17	-36.80	-57.56
Mr Price Group Ltd	MRP	17566	17457	0.62	4.39	12.02
Momentum Met Hldgs Ltd	MTM	2053	2030	1.13	-0.92	-6.21
Ninety One Plc	N91	4040	4040	0.00	1.94	-6.31
Nedbank Group Ltd	NED	22786	22971	-0.81	4.35	5.38
Northam Platinum Hldgs Ltd	NPH	11024	11311	-2.54	-0.55	-21.50
NEPI Rockcastle N.V.	NRP	13254	13271	-0.13	-0.40	4.87
Netcare Limited	NTC	1195	1195	0.00	-11.48	-16.08
Ninety One Limited	NY1	3981	3974	0.18	0.84	-7.35
Old Mutual Limited	OMU	1184	1141	3.77	-0.50	-9.34
OUTsurance Group Ltd	OUT	4179	4180	-0.02	0.70	-0.97
Pick n Pay Stores Ltd	PIK	1850	1853	-0.16	-15.53	-20.50
Pepkor Holdings Ltd	PPH	1888	1852	1.94	1.29	-3.82
Quilter Plc	QLT	2529	2542	-0.51	8.12	4.16
Redefine Properties Ltd	RDF	402	406	-0.99	-1.47	4.42
Remgro Ltd	REM	12300	11954	2.89	-15.98	-24.30
Resilient REIT Limited	RES	4658	4650	0.17	-0.13	5.17
Reinet Investments S.C.A	RNI	45017	45386	-0.81	-7.72	-3.44
Sappi Ltd	SAP	4989	5035	-0.91	8.43	12.87
Santam Limited	SNT	29566	29555	0.04	-1.46	3.17
The Spar Group Ltd	SPP	8840	8700	1.61	-10.71	-25.02
Sirius Real Estate Ltd	SRE	2306	2209	4.39	10.07	4.11
Tiger Brands Ltd	TBS	20233	20215	0.09	1.42	0.52
Transaction Capital Ltd	TCP	878	838	4.77	-7.87	10.03
The Foschini Group Limited	TFG	10303	10235	0.66	-4.08	-7.15
Thungela Resources Ltd	TGA	12100	12333	-1.89	17.20	-21.33
Telkom SA SOC Ltd	TKG	3000	2888	3.88	4.09	0.87
Truworths Int Ltd	TRU	7772	7713	0.76	3.70	4.53
Textainer Group Hldgs Ltd	TXT	94600	94600	0.00	-0.84	2.72
Woolworths Holdings Ltd	WHL	5950	5949	0.02	-11.19	-17.59
Zeda Limited	ZZD	1120	1026	9.16	-5.08	-12.16

LOCAL EQUITIES | JSE SMALL CAP COMPANIES (Cents Per Share)

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	120	120	0.00	-9.09	-26.83
ADVTECH Ltd	ADH	2871	2904	-1.14	6.97	16.99
Altron Limited A	AEL	1101	1154	-4.59	9.99	7.41
AECI Limited	AFE	9349	9372	-0.25	0.82	-14.77
Alexander Forbes Grp Hldgs	AFH	625	627	-0.32	-2.65	-5.30
Afrimat Limited	AFT	5796	5741	0.96	-1.11	-8.00
African Rainbow Cap Inv	AIL	500	485	3.09	3.52	2.25
Adcock Ingram Hldgs Ltd	AIP	5550	5566	-0.29	0.91	-7.65
Astral Foods Ltd	ARL	14355	14110	1.74	-4.57	-2.06
Attacq Limited	ATT	1073	1066	0.66	14.15	16.38
Brait PLC	BAT	132	132	0.00	-26.67	-27.47
Blue Label Telecoms Ltd	BLU	467	452	3.32	36.95	20.36
Coronation Fund Mngrs Ld	CML	3008	3030	-0.73	-3.37	-3.47
Curro Holdings Limited	COH	1100	1097	0.27	0.00	-5.58
Cashbuild Ltd	CSB	14400	14500	-0.69	0.35	-13.74
DRD Gold Ltd	DRD	1522	1537	-0.98	17.71	-3.49
Datatec Ltd	DTC	3776	3796	-0.53	-6.19	-6.77
Emira Property Fund Ltd	EMI	868	878	-1.14	0.00	1.52
Equites Prop Fund Ltd	EQU	1270	1272	-0.16	-5.86	-8.96
Famous Brands Ltd	FBR	5376	5500	-2.25	-5.45	-7.20
Fairvest Limited B	FTB	373	365	2.19	6.57	8.43
Grindrod Ltd	GND	1296	1278	1.41	2.86	13.09
Hosken Cons Inv Ltd	HCI	17268	17266	0.01	-1.81	-14.77
Hudaco Industries Ltd	HDC	15866	15855	0.07	-6.67	-1.23
Hyprop Inv Ltd	HYP	2925	2886	1.35	-8.34	-5.98
Investec Property Fund Ltd	IPF	758	757	0.13	-2.82	-5.25
JSE Ltd	JSE	8801	8885	-0.95	2.94	-4.79
KAP Industrial Hldgs Ltd	KAP	258	255	1.18	17.81	-1.53
Karooooo Ltd	KRO	49950	48999	1.94	0.39	5.16
PSG Konsult Limited	KST	1501	1514	-0.86	0.07	-2.21
Libstar Holdings Ltd	LBR	360	347	3.75	0.00	2.86
Lighthouse Properties plc	LTE	805	796	1.13	5.23	9.52
Industrials REIT Limited	MLI	0.6	0.5	20.00	33.33	-14.29
MAS P.L.C	MSP	1645	1620	1.54	-4.47	-4.97
Metair Investments Ltd	MTA	1342	1265	6.09	2.05	-24.39
Motus Holdings Ltd	MTH	8650	8700	-0.57	-9.87	-14.78
Murray & Roberts Hldgs	MUR	115	116	-0.86	-4.96	-22.82
Oceana Group Ltd	OCE	6964	6957	0.10	-1.40	-1.46
Omnia Holdings Ltd	OMN	5940	5931	0.15	-5.62	-9.13
Pan African Resource plc	PAN	525	505	3.96	14.13	28.36
PPC Limited	PPC	347	328	5.79	-5.45	-13.03
Raubex Group Ltd	RBX	3076	3090	-0.45	13.84	10.97
RFG Holdings Limited	RFG	1330	1335	-0.37	2.23	-1.48
Reunert Ltd	RLO	6608	6457	2.34	1.44	10.24
SA Corp Real Estate Ltd	SAC	249	252	-1.19	2.47	7.33
Super Group Ltd	SPG	2593	2601	-0.31	-5.71	-12.84
Stor-Age Prop REIT Ltd	SSS	1354	1342	0.89	-3.35	3.68
Southern Sun LTD	SSU	510	511	-0.20	-0.58	-2.86
Sun International Ltd	SUI	3699	3631	1.87	-8.28	-9.78
Tharisa plc	THA	1351	1405	-3.84	-3.43	-10.59
Tsogo Sun Gaming Ltd	TSG	1087	1100	-1.18	-5.72	-11.27
Vukile Property Fund Ltd	VKE	1490	1488	0.13	0.74	5.52
Wilson Bayly Hlm-Ovc Ltd	WBO	13611	13554	0.42	5.51	4.65

10-YEAR BOND YIELD | SELECTED ITEMS (Basis Point Change)

REGION	YIELD	1D	1M	1Y
United States	4.21%	-2	-9	--
United Kingdom	3.93%	-4	-26	57
Germany	2.29%	-6	-17	7
Japan	0.71%	-2	2	--
South African 10Y	10.82%	-4	63	93

SOUTH AFRICAN 10-YEAR

2023 vs 2024 to date

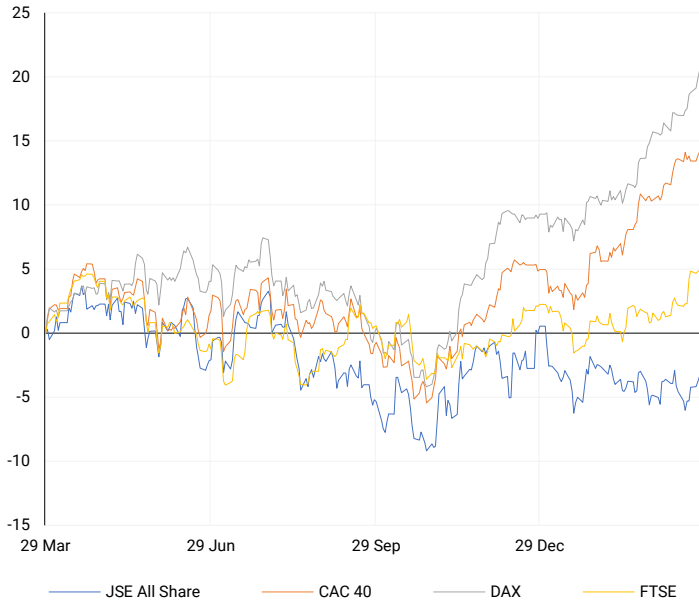


GLOBAL INTEREST RATES | SELECTED ITEMS

REGION	DATE CHANGED	CURRENT RATE
United States	Wed, 26 Jul '23	5.25%-5.50%
United Kingdom	Thu, 03 Aug '23	5.25%
European	Thu, 27 Jul '23	4.25%
SA Repo Rate	Thu, 25 May '23	8.25%
SA Prime Rate	Thu, 25 May '23	11.75%

EUROPEAN INDICES

Normalised percentage performances



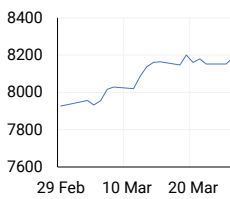
EUROPEAN MARKET SUMMARY

SELECTED ITEMS

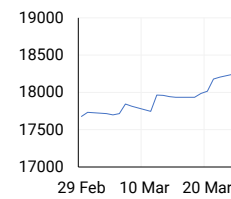
European stocks reached a new high with slight gains, driven by defensive sectors, while H&M experienced its best trading day in nearly nine months following positive quarterly results. The European Central Bank expressed growing confidence in inflation returning to its 2% target by mid-2025, as wage growth slows. Sweden's central bank kept its key rate steady at 4.00%, indicating a potential rate cut in the future due to easing inflation pressures. The pan-European STOXX 600 index edged up 0.1%, supported by stronger performances in utilities and healthcare.

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	8204.81	8184.75	0.25	0.53	3.23	8.77
DAX 30	18477.09	18384.35	0.50	2.56	5.24	10.30
Eurostoxx 50	5081.74	5064.18	0.35	1.63	4.01	12.39
FTSE	7931.98	7930.96	0.01	2.52	3.24	2.57

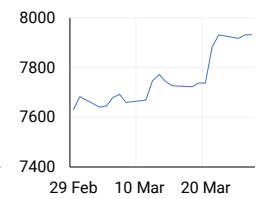
CAC 40



DAX

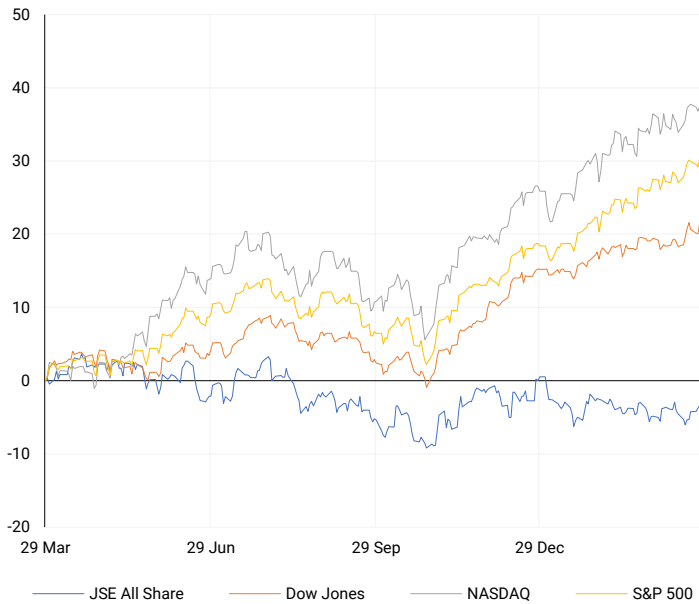


FTSE



AMERICAN INDICES

Normalised percentage performances



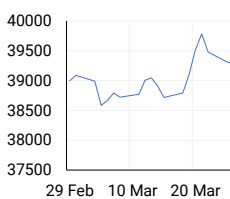
AMERICAN MARKET SUMMARY

SELECTED ITEMS

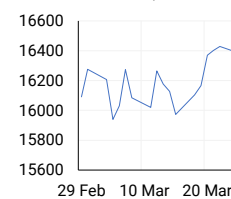
On Wednesday, U.S. stocks saw gains, with the Dow leading the way and the S&P 500 closing at a new record high, driven by drugmaker Merck. Investors awaited the next inflation data and Federal Reserve commentary for clues on future interest rate moves. Despite recent reports showing higher-than-expected inflation in consumer and producer prices, market expectations for a rate cut of at least 25 basis points from the Fed in June remained steady. The Fed's projections for three rate cuts this year, set at its recent policy meeting, have been maintained by central bank officials in their comments this week.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	39760.08	39282.33	1.22	0.63	2.02	5.49
Nasdaq	16399.52	16315.70	0.51	0.18	2.27	9.25
S&P 500	5248.49	5203.58	0.86	0.46	3.35	10.04
US VIX	12.78	13.24	-3.47	-1.99	-4.84	2.65

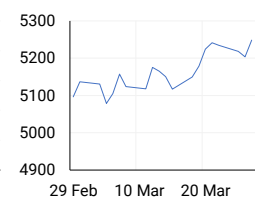
DOW JONES



NASDAQ

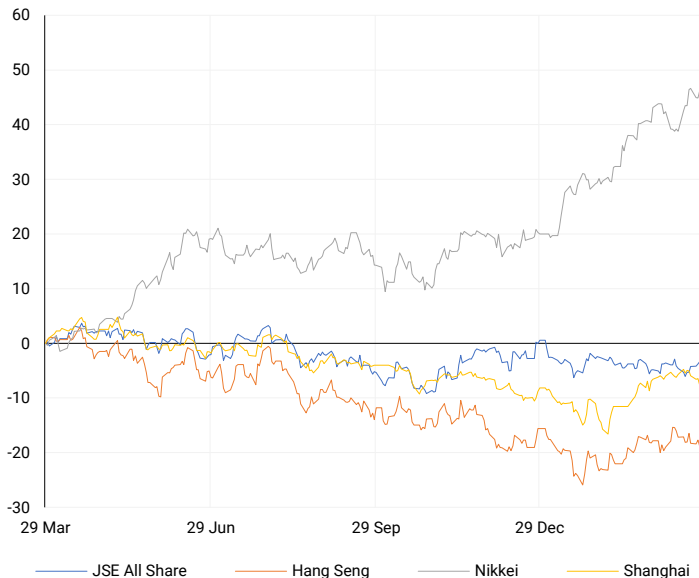


S&P 500



ASIAN INDICES

Normalised percentage performances



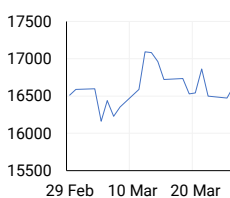
ASIAN MARKET SUMMARY

SELECTED ITEMS

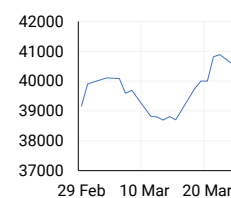
This morning, Japanese stocks experienced the sharpest decline across Asian markets, contrasted by Australian stocks achieving a record high, buoyed by a surge in mining shares. According to the Australian Bureau of Statistics, Australian retail sales saw a modest increase of 0.3% month-on-month in February. However, this figure fell below the forecasted 0.4% rise in a Reuters poll. Notably, Australian retail sales had surged by 1.1% in January. February's retail sales reached 35.87 billion Australian dollars (\$23.41 billion), marking a 1.6% year-over-year increase.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	16392.84	16618.32	-1.36	-0.91	-2.37	-3.84
Nikkei 225	40762.73	40398.03	0.90	1.90	3.88	21.81
Shanghai	2993.14	3031.48	-1.26	-2.81	-0.74	0.61

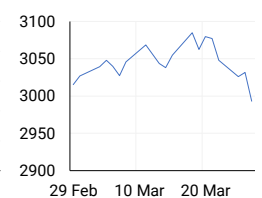
HANG SENG



NIKKEI



SHANGHAI



COMMODITIES MARKET SUMMARY

SELECTED ITEMS

This morning, gold prices experienced a slight decline as the U.S. dollar and bond yields rose following comments from a Federal Reserve official regarding interest rate cuts, prompting investors to await further economic data for policy insights. Conversely, global oil prices saw a modest increase, rebounding from two consecutive sessions of decline, as investors reevaluated the recent U.S. crude oil and gasoline inventories data, leading them to resume buying activity.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	86.36	86.35	0.01	0.57	0.27	12.03
Gold	2195.16	2194.74	0.02	0.76	0.40	6.39
Palladium	997.12	990.25	0.69	-0.19	-2.91	-9.75
Platinum	898.98	896.79	0.24	-0.85	-1.34	-9.16
Silver	24.67	24.65	0.10	0.80	-3.63	3.61

BRENT CRUDE

One-year



PLATINUM

One-year



GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	18.93	18.89	0.20	-0.49	0.95	3.07
GBPZAR	23.91	23.90	0.02	-0.29	-0.05	2.59
EURZAR	20.48	20.47	0.04	-0.41	0.23	1.41
AUDZAR	12.36	12.36	0.01	-0.36	0.30	-0.82
EURUSD	1.08	1.08	-0.04	-0.03	-0.88	-1.90
USDJPY	151.35	151.33	0.02	-0.16	0.01	7.30
GBPUSD	1.26	1.26	-0.07	0.09	-1.14	-0.72
USDCHF	0.91	0.90	0.14	-0.03	1.90	7.38

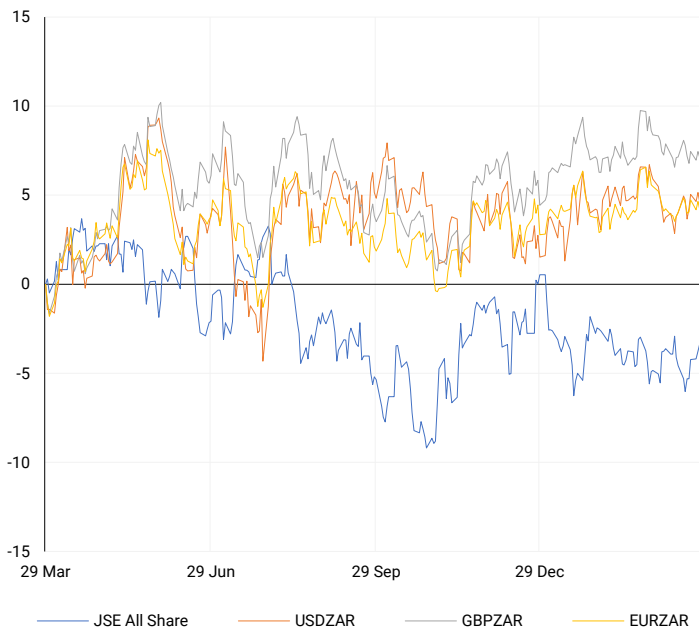
CURRENCY MARKET SUMMARY

SELECTED ITEMS

On Wednesday, South Africa's rand strengthened following the central bank's decision to keep its main interest rate unchanged, as anticipated. Meanwhile, the U.S. dollar gained ground against other major currencies this morning, supported by remarks from a Federal Reserve official indicating a reluctance to rush into rate cuts amidst persistent inflation concerns, while traders awaited key economic data.

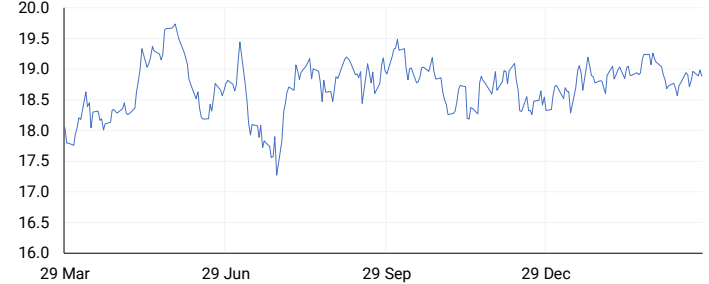
CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



USDZAR

One-year



EURUSD

One-year



SOURCES | JSE, IRESS, MONEYWEB, CNBC, BBC, CNN

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