

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	82765.10	81198.64	1.93	2.69	3.84	7.64
Top 40	75661.60	74092.71	2.12	2.81	3.68	7.33
Financial 15	19840.40	19524.24	1.62	3.99	5.15	11.01
Industrial 25	109921.00	108704.91	1.12	2.07	1.56	5.98
Resource 10	62398.70	59680.63	4.55	2.17	5.65	8.46
Mid Cap	87503.30	85430.76	2.43	3.46	4.88	8.82
Small Cap	81370.80	80594.30	0.96	1.93	5.17	12.24
Banks	12549.30	12390.51	1.28	3.91	6.06	14.62
Retailers	6785.13	6706.14	1.18	1.74	3.49	8.85
Property (J253) - TR	2107.90	2107.90	0.00	1.26	3.24	13.10

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	40842.79	40743.33	0.24	2.48	4.41	8.37
Nasdaq	17599.40	17147.42	2.64	1.48	-0.75	17.24
S&P 500	5522.30	5436.44	1.58	1.75	1.13	15.78
US VIX	16.36	17.69	-7.52	-9.31	31.51	31.41

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7531.49	7474.94	0.76	0.24	0.70	-0.15
DAX 30	18508.65	18411.18	0.53	0.66	1.50	10.49
Eurostoxx 50	4869.80	4841.60	0.58	0.17	-0.47	7.70
FTSE	8367.98	8274.41	1.13	2.63	2.50	8.21

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17344.60	17002.91	2.01	0.19	-2.11	1.74
Nikkei 225	39101.82	38525.95	1.49	-0.14	-1.22	16.85
Shanghai	2938.75	2879.30	2.06	1.27	-0.97	-1.22

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	364.20	353.60	3.00	-1.28	-3.44	21.85
BHP AUS	4211.00	4154.00	1.37	-1.26	0.19	-17.60

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

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

TIME	AREA	TODAY'S EVENTS & RELEASES	PERIOD	EXP.	PREV.
11:00	ZA	ABSA Manufacturing PMI	Jul	46.00	45.70
13:00	GB	BoE Interest Rate Decision	---	5.00%	5.25%
13:00	GB	BoE Monetary Policy Report	---	---	---
14:30	US	Initial Jobless Claims	Jul	241.00K	235.00K
16:00	US	ISM Manufacturing PMI	Jul	48.20	48.50

TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
11:00	EA	Inflation Rate y/y Flash	Jun	2.30%	2.60%
14:00	ZA	Balance of Trade	Jun	R16.00B	R24.23B
14:15	US	ADP Employment Change	Jul	140.00K	122.00K
14:30	US	Employment Cost Index q/q	Q2	1.10%	0.90%
20:30	US	Fed Press Conference	---	---	---

JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Karoo000 Ltd	KRO	69000	10.84	17.90	45.27	
Sibanye Stillwater Ltd	SSW	2086	7.53	0.87	-16.22	
Harmony GM Co Ltd	HAR	17802	7.24	4.25	48.86	
Gold Fields Ltd	GFI	31920	6.21	2.74	14.91	
Impala Platinum Hlgs Ltd	IMP	9320	5.68	1.18	2.11	
RCL Foods Limited	RCL	980	4.81	4.14	15.16	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Hosken Cons Inv Ltd	HCI	18636	-1.58	-2.64	-8.02	
Afrimat Limited	AFT	6858	-1.15	1.03	8.86	
Vukile Property Fund Ltd	VKE	1647	-1.08	0.24	16.64	
Grindrod Ltd	GND	1556	-1.08	-0.19	35.78	
Sirius Real Estate Ltd	SRE	2216	-1.07	-0.05	0.05	

DIVIDEND DATA

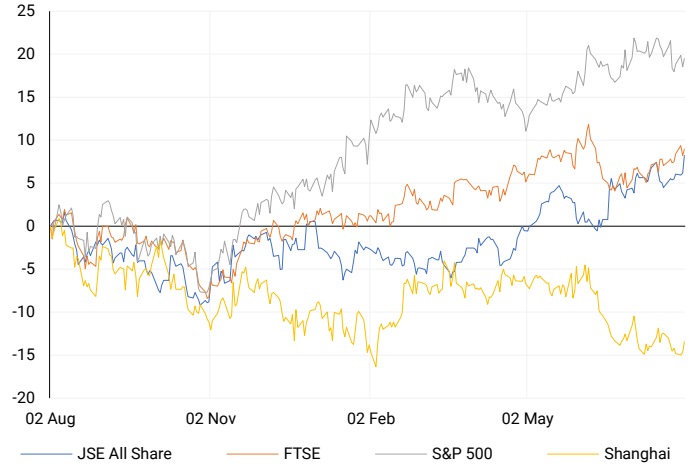
COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
Karoo000	KRO	200 ZARc	---	---	---
Crookes Brothers	CKS	108 USDc	---	---	---
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SOURCES | JSE, IRESS, MONEYWEB, CNBC, BBC, CNN

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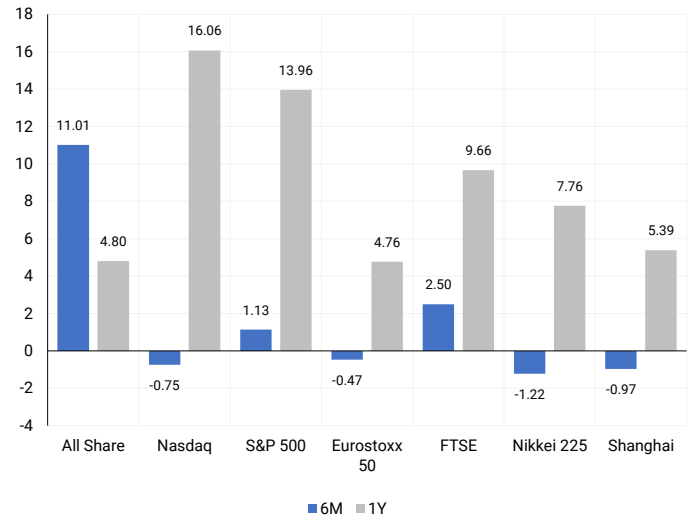
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



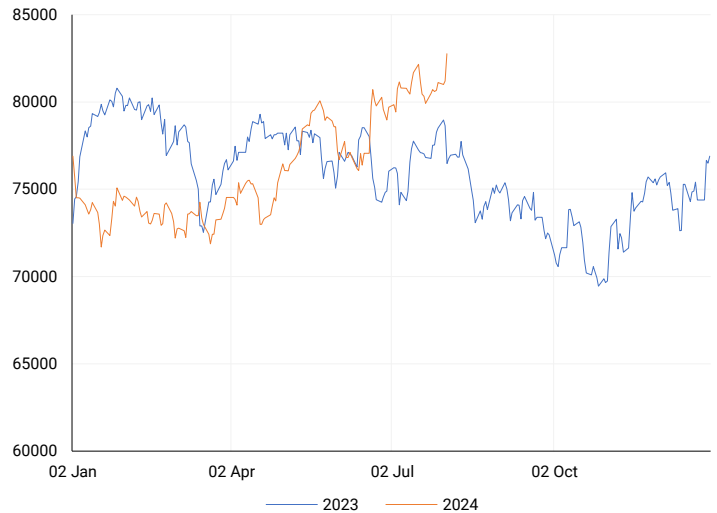
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



Last date to trade Mon, 05 August

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

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	15980	15879	0.64	-0.97	0.85	-2.39
Anglo American plc	55169	53478	3.16	4.85	-4.30	16.52
Anglo American Plat Ltd	70650	69057	2.31	3.75	17.41	-26.71
Anglogold Ashanti Ltd	52260	49870	4.79	0.32	13.67	47.87
Anheuser-Busch InBev SA NV	108400	109349	-0.87	-2.53	1.96	-9.68
BHP Group Limited	50125	49359	1.55	0.14	-3.85	-20.87
BID Corporation Ltd	45331	44412	2.07	2.48	6.69	6.25
British American Tob plc	63996	64681	-1.06	5.31	13.94	18.18
Compagnie Fin Richemont	276824	278200	-0.49	0.44	-2.87	7.81
Capitec Bank Hldgs Ltd	283600	276644	2.51	3.43	7.87	39.96
Discovery Ltd	14280	13857	3.05	4.54	6.02	-0.61
Firststrand Ltd	8170	8082	1.09	4.57	6.24	11.14
Gold Fields Ltd	31920	30055	6.21	2.74	16.74	14.91
Glencore plc	10097	9817	2.85	-1.69	-3.23	-9.57
Impala Platinum Hlgs Ltd	9320	8819	5.68	1.18	2.68	2.11
Kumba Iron Ore Ltd	39729	38700	2.66	-1.65	-9.63	-35.38
Mondi plc	35733	36014	-0.78	-3.24	1.51	-1.56
MTN Group Ltd	7911	7683	2.97	3.07	-6.86	-31.51
Naspers Ltd -N-	352221	347047	1.49	1.54	-1.26	12.60
Prosus N.V.	63489	63202	0.45	-0.57	-2.42	13.29
South32 Limited	3709	3665	1.20	2.74	-16.61	-12.09
Standard Bank Group Ltd	22178	22050	0.58	4.57	5.20	6.57
Shoprite Holdings Ltd	30453	29800	2.19	4.59	7.22	10.72
Sanlam Limited	8155	7978	2.22	3.48	0.78	12.02
Sasol Limited	14735	14394	2.37	2.26	6.70	-20.48
Sibanye Stillwater Ltd	2086	1940	7.53	0.87	5.78	-16.22
Vodacom Group Ltd	10222	10041	1.80	7.48	4.83	-3.57

SOUTH AFRICAN MARKET SUMMARY

SELECTED ITEMS

On the stock market, the Top-40 index closed over 2% higher. Domestically, South Africa reported a trade surplus of 24.23 billion rand in June, according to revenue service figures released on Wednesday. Woolworths, a retailer of food, fashion, and beauty products, announced a trading update on Sens, expecting a double-digit drop in its earnings per share for the 53 weeks ending June 30, 2024.

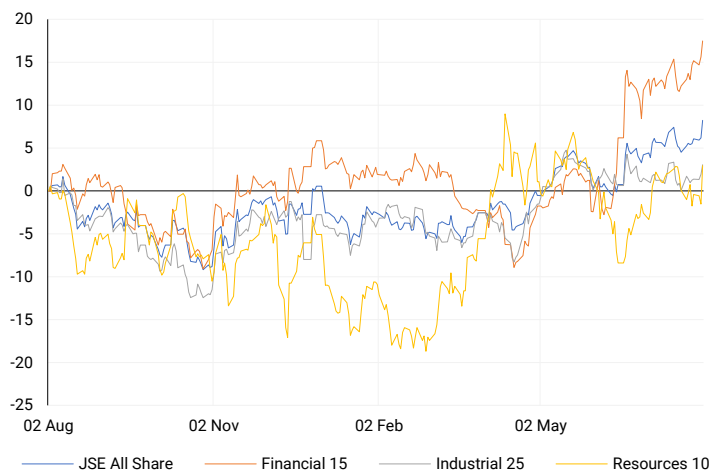
JSE ALL SHARE

One-year



LOCAL INDICES

Normalised percentage performances



EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
Capital & Regional	CRP	Interim	1 Aug '24
AngloGold Ashanti	ANG	Interim	2 Aug '24
Mondi	MNP	Interim	2 Aug '24
JSE	JSE	Interim	2 Aug '24
Astoria	ARA	Interim	2 Aug '24

BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	8701	11.24	Thu, 06 Jun '24
Standard Bank	SBPP	8899	11.15	Thu, 05 Sep '24
Absa	ABSP	78200	11.48	Thu, 12 Sep '24
Capitec	CPIP	10000	9.69	Thu, 19 Sep '24
Steinhoff	SHFF	9734	10.47	Thu, 17 Oct '24
Grindrod	GNDP	9150	12.22	Thu, 19 Sep '24
Netcare	NTCP	8250	11.82	Thu, 31 Oct '24
Discovery	DSBP	9800	11.91	Thu, 19 Sep '24
Invicta	IVTP	---	13.41	Thu, 27 Jun '24

LOCAL SENS ANNOUNCEMENTS

SELECTED RELEASE

AECI LIMITED – Unaudited consolidated interim financial results

For the half-year ending on June 30, 2024, the unaudited consolidated interim financial results showed improved safety with a TRIR of 0.28 compared to 0.38 the previous year. However, revenue decreased by 4% to R17,580 million. EBITDA dropped by 24% to R1,390 million, and profit from operations fell by 36% to R818 million. Headline earnings per share (HEPS) declined by 57% to 260 cents, and earnings per share (EPS) dropped by 61% to 233 cents. Additionally, no interim dividend was declared, whereas last year, it was 100 cents per share.

AFE | 3.21% OPEN | 10050c HIGH | 10800c LOW | 10002c CLOSE | 10631c TIME | 07:05

WOOLWORTHS HOLDINGS LIMITED – Trading statement

For the 52-week period ending June 23, 2024, earnings per share (EPS), headline EPS (HEPS), and adjusted diluted HEPS (adHEPS) from continuing operations are expected to be lower compared to the previous period due to last year's record earnings. EPS is projected to decrease by 32-37% to 265.3-286.3 cents, HEPS by 14-19% to 343.0-364.1 cents, and adHEPS by 10-15% to 363.5-384.9 cents. Without the goodwill impairment of the Politix business, EPS would be 15-20% lower. For the total group, including last year's contribution from David Jones, EPS is expected to drop by 45-50% to 275.5-303.1 cents, HEPS by 27-32% to 350.0-375.7 cents, and adHEPS by 21-26% to 376.1-401.6 cents.

WHL | 2.03% OPEN | 5714c HIGH | 6195c LOW | 5541c CLOSE | 6020c TIME | 07:05

SHAFTESBURY CAPITAL PLC – Interim results

For the six months ending June 30, 2024, gross profit increased to £80.7 million from £58.3 million the previous year. However, profit for the year significantly dropped to £86.1 million from £799.1 million. Basic earnings per share fell to 4.7p from 54.2p, while headline earnings per share rose to 1.8p from 0.8p. EPRA earnings per share increased to 1.6p from 0.7p, and underlying earnings per share remained steady at 1.9p. The interim dividend per share grew to 1.7p from 1.5p, but the total shareholder return declined to 2.0% from 9.6%.

SHC | 0.42% OPEN | 3550c HIGH | 3651c LOW | 3550c CLOSE | 3568c TIME | 08:00

ALTRON LIMITED – Trading statement

According to JSE Limited trading statement requirements, shareholders are informed that for the six months ending August 31, 2024, there is a reasonable certainty that both continuing headline earnings per share (HEPS) and continuing earnings per share (EPS) will be at least 20% higher compared to the same period last year. Additionally, Group HEPS and Group EPS are also expected to be at least 20% higher than the previous period.

AEL | 2.38% OPEN | 1651c HIGH | 1800c LOW | 1651c CLOSE | 1720c TIME | 07:05

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmacare Hldgs Ltd	APN	25186	24285	3.71	7.95	23.76
African Rainbow Min Ltd	ARI	21600	21044	2.64	-4.85	8.00
AVI Ltd	AVI	9780	9739	0.42	3.39	19.17
Barloworld Ltd	BAW	9295	9201	1.02	10.92	17.66
Bidvest Ltd	BVT	27335	26976	1.33	-3.90	8.35
Bytes Technology Grp PLC	BYI	11806	11700	0.91	-6.58	-17.56
Capital&Counties Prop plc	CCO	3568	3553	0.42	11.22	9.78
Clicks Group Ltd	CLS	35400	34529	2.52	2.80	8.69
Dis-Chem Pharmacies Ltd	DCP	3579	3529	1.42	6.33	16.62
Exxaro Resources Ltd	EXX	19487	19000	2.56	9.48	-4.70
Fortress Real Est INV B	FFB	1711	1696	0.88	3.57	19.15
Growthpoint Prop Ltd	GRT	1234	1216	1.48	1.31	5.65
Harmony GM Co Ltd	HAR	17802	16600	7.24	5.93	48.86
Hammerson plc	HMN	675	670	0.75	5.63	-0.74
Investec Ltd	INL	14220	14224	-0.03	7.50	13.23
Investec plc	INP	14329	14378	-0.34	8.31	13.77
Italtile Ltd	ITE	1200	1170	2.56	8.40	7.14
Life Healthc Grp Hldgs Ltd	LHC	1335	1342	-0.52	3.89	-27.33
MultiChoice Group Ltd	MCG	10930	10900	0.28	2.53	34.90
Montauk Renewables Inc	MKR	10694	10500	1.85	-0.06	-37.83
Mr Price Group Ltd	MRP	21630	21230	1.88	5.04	37.94
Momentum Met Hldgs Ltd	MTM	2682	2624	2.21	17.12	22.52
Ninety One Plc	N91	4033	4032	0.02	4.75	-6.47
Nedbank Group Ltd	NED	27806	26981	3.06	8.44	28.59
Northam Platinum Hldgs Ltd	NPH	14266	13677	4.31	12.07	1.59
NEPI Rockcastle N.V.	NRP	13772	13579	1.42	4.83	8.97
Netcare Limited	NTC	1300	1297	0.23	2.04	-8.71
Ninety One Limited	NY1	3977	3961	0.40	4.66	-7.45
Old Mutual Limited	OMU	1232	1197	2.92	-0.56	-5.67
OUTsurance Group Ltd	OUT	4830	4716	2.42	4.05	14.45
Pick n Pay Stores Ltd	PIK	2325	2300	1.09	6.39	-0.09
Pepkor Holdings Ltd	PPH	2039	2018	1.04	8.86	3.87
Quilter Plc	QLT	3114	3069	1.47	12.79	28.25
Redefine Properties Ltd	RDF	426	415	2.65	5.97	10.65
Remgro Ltd	REM	13999	13600	2.93	2.87	-13.84
Resilient REIT Limited	RES	5025	4992	0.66	7.23	13.46
Reinet Investments S.C.A	RNI	49040	47903	2.37	6.72	5.19
Sappi Ltd	SAP	5320	5344	-0.45	9.60	20.36
Santam Limited	SNT	32296	32348	-0.16	-0.84	12.70
The Spar Group Ltd	SPP	12547	12500	0.38	6.00	6.42
Sirius Real Estate Ltd	SRE	2216	2240	-1.07	2.59	0.05
Tiger Brands Ltd	TBS	22284	22267	0.08	12.00	10.71
Transaction Capital Ltd	TCP	284	283	0.35	-2.07	-64.41
The Foschini Group Limited	TFG	13442	13500	-0.43	5.42	21.14
Thungela Resources Ltd	TGA	12083	11895	1.58	8.41	-21.44
Telkom SA SOC Ltd	TKG	2361	2335	1.11	-3.67	-20.61
Truworths Int Ltd	TRU	9048	8911	1.54	-3.00	21.69
Woolworths Holdings Ltd	WHL	6020	5900	2.03	-2.56	-16.62
Zeda Limited	ZZD	1250	1261	-0.87	1.21	-1.96

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

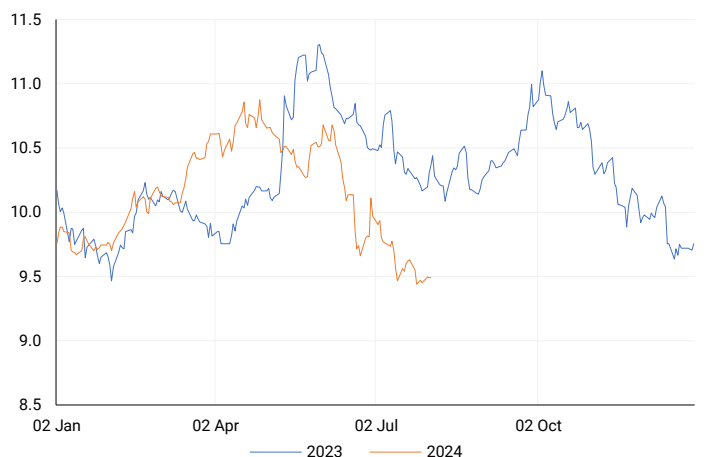
COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	133	137	-2.92	11.76	-18.90
ADVTECH Ltd	ADH	3033	2989	1.47	7.17	23.59
Altron Limited A	AEL	1720	1680	2.38	31.20	67.80
AECI Limited	AFE	10631	10300	3.21	-1.59	-3.08
Alexander Forbes Grp Hldgs	AFH	665	650	2.31	-9.89	0.76
Afrimat Limited	AFT	6858	6938	-1.15	-3.12	8.86
African Rainbow Cap Inv	AIL	674	650	3.69	-2.32	37.83
Adcock Ingram Hldgs Ltd	AIP	5772	5811	-0.67	-3.96	-3.96
Astral Foods Ltd	ARL	17241	17000	1.42	5.29	17.63
Attacq Limited	ATT	1093	1095	-0.18	0.74	18.55
Brait PLC	BAT	90	86	4.65	40.81	-50.55
Blue Label Telecoms Ltd	BLU	432	425	1.65	10.77	11.34
Burstone Group	BTN	786	777	1.16	9.47	-1.75
Coronation Fund Mngrs Ld	CML	3739	3744	-0.13	4.15	19.99
Curro Holdings Limited	COH	1213	1205	0.66	7.63	4.12
Cashbuild Ltd	CSB	16924	16430	3.01	10.03	1.38
DRD Gold Ltd	DRD	1855	1821	1.87	18.15	17.63
Datatec Ltd	DTC	3573	3568	0.14	-4.72	-11.78
Emira Property Fund Ltd	EMI	1084	1071	1.21	4.94	26.78
Equites Prop Fund Ltd	EQU	1309	1290	1.47	2.35	-6.16
Famous Brands Ltd	FBR	5391	5350	0.77	3.26	-6.94
Fairvest Limited B	FTB	402	390	3.08	4.42	16.86
Grindrod Ltd	GND	1556	1573	-1.08	3.46	35.78
Hosken Cons Inv Ltd	HCI	18636	18936	-1.58	6.23	-8.02
Hudaco Industries Ltd	HDC	18200	17651	3.11	7.37	13.30
Hyprop Inv Ltd	HYP	3229	3183	1.45	2.83	3.79
JSE Ltd	JSE	10650	10459	1.83	-2.07	15.21
KAP Industrial Hldgs Ltd	KAP	305	301	1.33	7.02	16.41
Karooooo Ltd	KRO	69000	62252	10.84	27.78	45.27
PSG Konsult Limited	KST	1690	1660	1.81	-2.54	10.10
Libstar Holdings Ltd	LBR	391	386	1.30	0.26	11.71
Lighthouse Properties plc	LTE	820	815	0.61	2.76	11.56
Industrials REIT Limited	MLI	1.4	1.4	0.00	250.00	100.00
MAS P.L.C	MSP	1845	1820	1.37	13.89	6.59
Metair Investments Ltd	MTA	1412	1372	2.92	28.36	-20.45
Motus Holdings Ltd	MTH	10324	10367	-0.41	11.74	1.71
Murray & Roberts Hldgs	MUR	307	306	0.33	43.46	106.04
Oceana Group Ltd	OCE	6986	6900	1.25	-2.77	-1.15
Omnia Holdings Ltd	OMN	6567	6565	0.03	-0.79	0.46
Pan African Resource plc	PAN	691	682	1.32	14.21	68.95
PPC Limited	PPC	381	376	1.33	18.32	-4.51
Raubex Group Ltd	RBX	4590	4519	1.57	14.75	65.58
RFG Holdings Limited	RFG	1527	1526	0.07	-3.23	13.11
Reunert Ltd	RLO	7180	7126	0.76	2.22	19.79
SA Corp Real Estate Ltd	SAC	269	270	-0.37	3.86	15.95
Super Group Ltd	SPG	3040	3014	0.86	7.53	2.18
Stor-Age Prop REIT Ltd	SSS	1333	1342	-0.67	-3.75	2.07
Southern Sun LTD	SSU	616	607	1.48	16.23	17.33
Sun International Ltd	SUI	3849	3770	2.10	4.08	-6.12
Tharisa plc	THA	2000	1931	3.57	4.11	32.36
Tsogo Sun Gaming Ltd	TSG	1126	1120	0.54	1.72	-8.08
Vukile Property Fund Ltd	VKE	1647	1665	-1.08	7.65	16.64
Wilson Bayly Hlm-Ovc Ltd	WBO	18000	17876	0.69	12.44	38.40

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

REGION	YIELD	1D	1M	1Y
United States	4.05%	-8	-34	--
United Kingdom	3.97%	-7	-20	-34
Germany	2.30%	-4	-20	-19
Japan	1.02%	3	-2	--
South African 10Y	9.41%	-10	-78	-93

SOUTH AFRICAN 10-YEAR

2023 vs 2024 to date

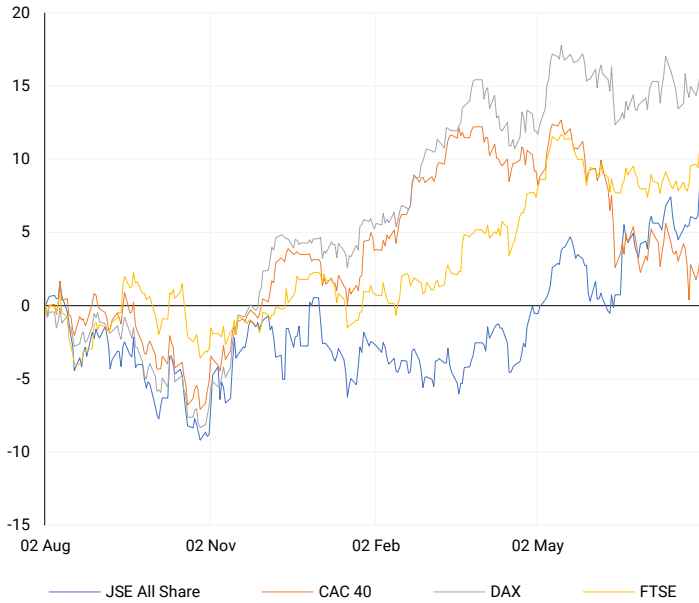


GLOBAL INTEREST RATES | SELECTED ITEMS

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%

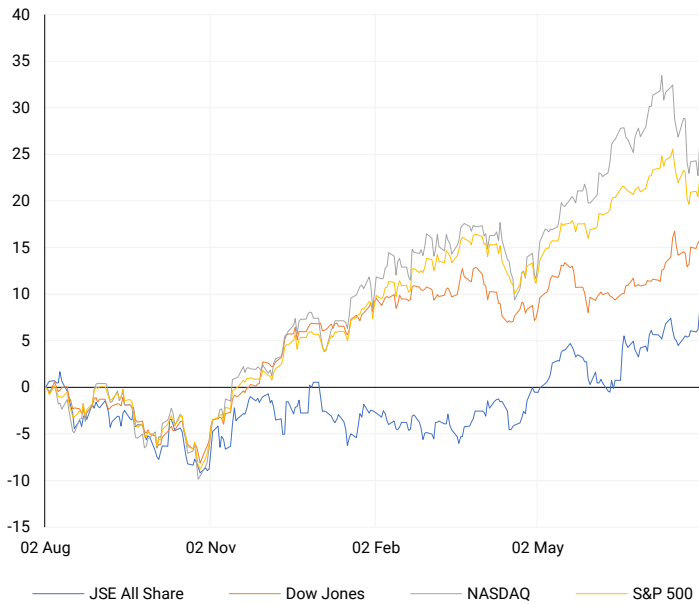
EUROPEAN INDICES

Normalised percentage performances



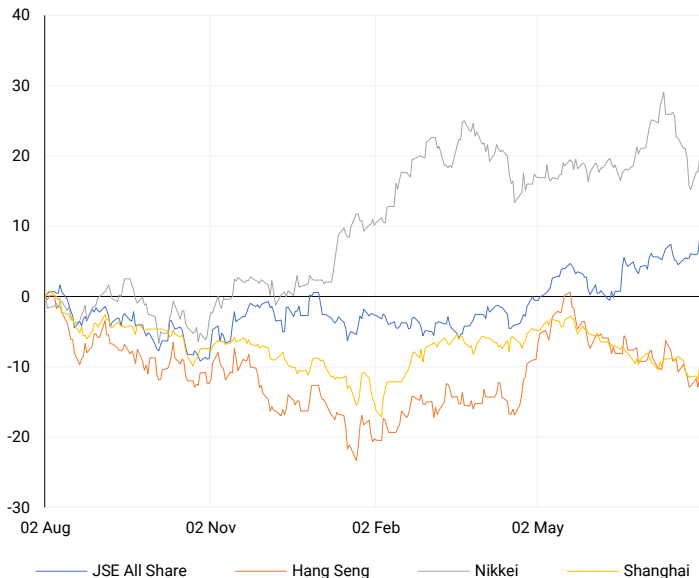
AMERICAN INDICES

Normalised percentage performances



ASIAN INDICES

Normalised percentage performances



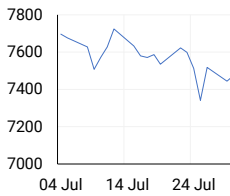
EUROPEAN MARKET SUMMARY

SELECTED ITEMS

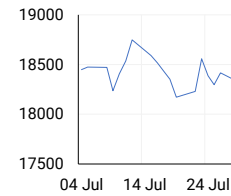
European shares rose on Wednesday, driven by a jump in ASML's stock after reports that the Dutch chip equipment manufacturer would be exempt from a new U.S. rule on foreign chip equipment exports. Positive earnings reports also contributed to the gains. The pan-European STOXX 600 index closed higher, hitting a two-week high earlier in the session and marking a monthly gain of over 1%. Additionally, macroeconomic data was in focus, with euro zone inflation unexpectedly increasing in July, although a key measure of price growth in the services sector showed signs of easing.

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7531.49	7474.94	0.76	0.24	0.70	-0.15
DAX 30	18508.65	18411.18	0.53	0.66	1.50	10.49
Eurostoxx 50	4869.80	4841.60	0.58	0.17	-0.47	7.70
FTSE	8367.98	8274.41	1.13	2.63	2.50	8.21

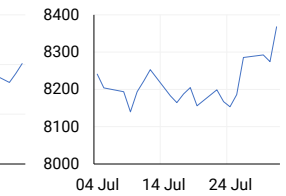
CAC 40



DAX



FTSE



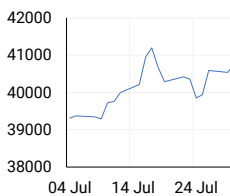
AMERICAN MARKET SUMMARY

SELECTED ITEMS

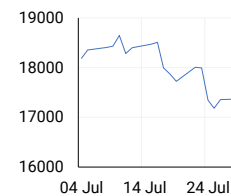
The S&P 500 and Nasdaq saw their biggest gains since February 22, and the Dow also rose on Wednesday, driven by a surge in chip stocks and the Federal Reserve's decision to keep interest rates unchanged. The Fed hinted at possible rate cuts in September if inflation decreases. They maintained the benchmark overnight interest rate at 5.25%-5.50% after a two-day meeting, just before the upcoming U.S. elections. Additionally, data revealed that U.S. private payrolls in July increased less than expected, suggesting a cooling in the tight labour market.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	40842.79	40743.33	0.24	2.48	4.41	8.37
Nasdaq	17599.40	17147.42	2.64	1.48	-0.75	17.24
S&P 500	5522.30	5436.44	1.58	1.75	1.13	15.78
US VIX	16.36	17.69	-7.52	-9.31	31.51	31.41

DOW JONES



NASDAQ



S&P 500



ASIAN MARKET SUMMARY

SELECTED ITEMS

Asian shares surged this morning, following a significant revival in global tech stocks led by Meta and Nvidia. The Bank of Japan raised interest rates for only the second time in 17 years and hinted at more increases. Japan's Nikkei fell as a stronger yen negatively impacted the outlook for exporters. Meanwhile, Chinese blue chips declined after a private survey revealed that China's manufacturing sector unexpectedly contracted in July, indicating potential challenges for the country's growth.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17344.60	17002.91	2.01	0.19	-2.11	1.74
Nikkei 225	39101.82	38525.95	1.49	-0.14	-1.22	16.85
Shanghai	2938.75	2879.30	2.06	1.27	-0.97	-1.22

HANG SENG



NIKKEI



SHANGHAI



COMMODITIES MARKET SUMMARY

SELECTED ITEMS

Gold prices reached a two-week high this morning after U.S. Federal Reserve Chair Jerome Powell hinted at potential interest rate cuts in September. Meanwhile, oil prices increased in early Asian trading, continuing their rise from the previous session due to the killing of a Hamas leader in Iran, which heightened the threat of a broader Middle East conflict, and signs of strong oil demand in the U.S.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	81.52	80.72	0.99	2.14	-0.98	4.72
Gold	2447.01	2447.45	-0.02	1.52	2.07	18.64
Palladium	930.20	929.03	0.13	4.08	-0.61	-15.33
Platinum	976.65	979.10	-0.25	1.72	2.81	-0.83
Silver	28.95	29.01	-0.21	2.22	0.35	21.95

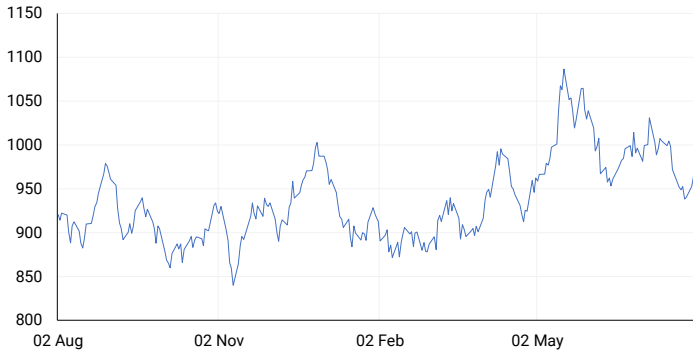
BRENT CRUDE

One-year



PLATINUM

One-year



GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	18.24	18.19	0.28	-0.77	-0.79	-0.74
GBPZAR	23.44	23.42	0.11	-0.43	-1.12	0.52
EURZAR	19.75	19.70	0.26	-0.59	-0.97	-2.42
AUDZAR	11.92	11.91	0.06	-0.57	-1.28	-4.40
EURUSD	1.08	1.08	0.04	0.09	-0.15	-1.93
USDJPY	149.68	149.99	-0.21	-1.82	-2.54	6.34
GBPUSD	1.29	1.29	-0.02	0.16	-0.44	0.97
USDCHF	0.88	0.88	-0.17	-0.50	-0.77	4.36

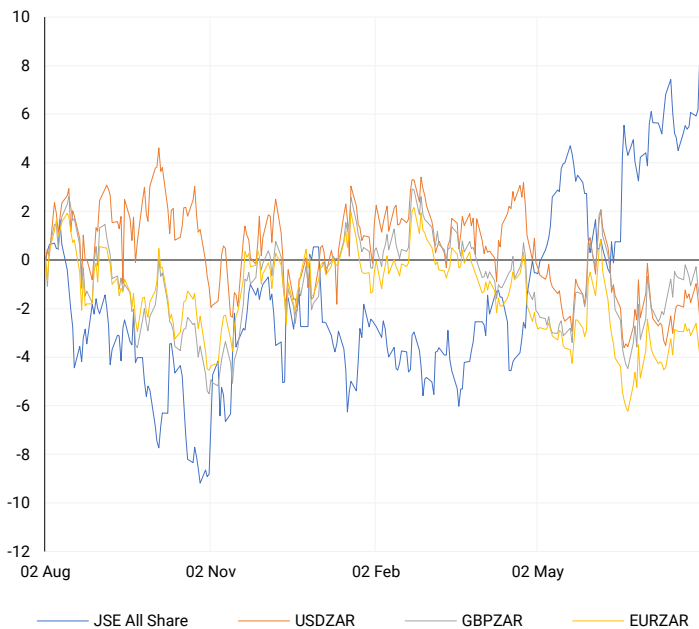
CURRENCY MARKET SUMMARY

SELECTED ITEMS

South Africa's rand strengthened on Wednesday in anticipation of the U.S. Federal Reserve's policy decision. The U.S. dollar weakened this morning after the Fed hinted at a possible interest rate cut in September, keeping the yen near its highest level since March following the Bank of Japan's hawkish stance.

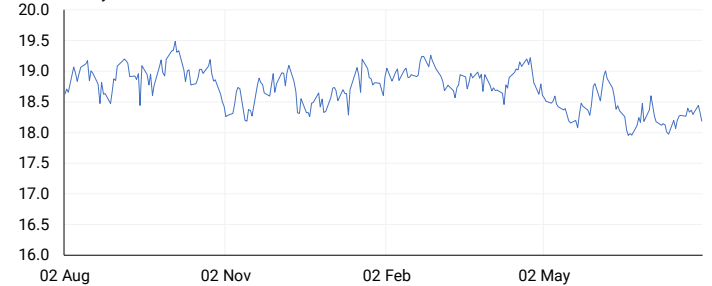
CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



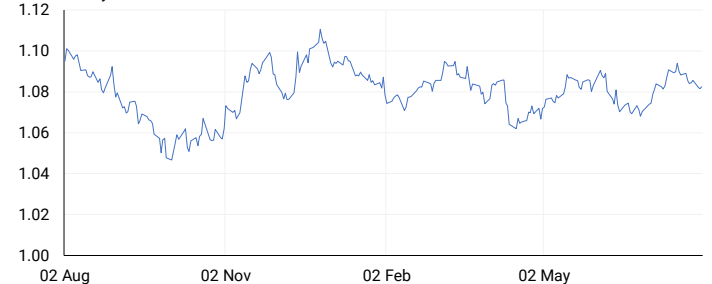
USDZAR

One-year



EURUSD

One-year



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

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