

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	84193.90	84351.57	-0.19	0.47	3.79	9.49
Top 40	76716.90	76971.36	-0.33	0.07	3.61	8.83
Financial 15	20797.40	20633.09	0.80	1.36	6.94	16.36
Industrial 25	113669.00	114656.20	-0.86	0.79	5.14	9.60
Resource 10	58596.40	58933.78	-0.57	-2.85	-2.95	1.85
Mid Cap	88736.50	88659.62	0.09	0.75	4.40	10.35
Small Cap	85195.00	84641.55	0.65	3.50	5.74	17.52
Banks	13190.60	13056.50	1.03	1.30	6.73	20.48
Retailers	7449.50	7360.08	1.21	3.11	12.40	19.51
Property (J253) - TR	2249.70	2249.70	0.00	2.03	7.53	20.71

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	41240.52	41175.08	0.16	0.84	1.60	9.42
Nasdaq	17725.77	17877.79	-0.85	-0.84	2.12	18.08
S&P 500	5616.84	5634.61	-0.32	0.15	2.89	17.76
US VIX	16.15	15.86	1.83	10.24	-1.46	29.72

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7590.37	7577.04	0.18	1.18	0.97	0.63
DAX 30	18617.02	18633.10	-0.09	1.06	1.08	11.14
Eurostoxx 50	4897.00	4907.55	-0.21	0.48	0.75	8.30
FTSE	8327.78	8327.78	0.00	-0.35	0.51	7.69

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17798.73	17612.10	1.06	1.30	4.57	4.41
Nikkei 225	38110.22	38364.27	-0.66	1.93	1.18	13.88
Shanghai	2855.52	2854.37	0.04	-1.32	-1.22	-4.01

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	380.60	382.00	-0.37	1.70	2.52	31.63
BHP AUS	4167.00	4084.00	2.03	0.42	2.79	-18.98

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

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

TIME	AREA	TODAY'S EVENTS & RELEASES	PERIOD	EXP.	PREV.
16:00	US	CB Consumer Confidence	Aug	100.00	100.30
16:00	US	Richmond Manufacturing Index	Aug	-15.00	-17.00
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TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
10:00	DE	Ifo Business Climate	Aug	86.30	86.60
14:30	US	Durable Goods Orders m/m	Jul	3.00%	9.90%
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JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Brait PLC	BAT	114	6.54	29.55	-37.36	
Redefine Properties Ltd	RDF	475	3.71	6.26	23.38	
Blue Label Telecoms Ltd	BLU	537	3.67	22.60	38.40	
Metair Investments Ltd	MTA	1425	3.64	4.40	-19.72	
Pepkor Holdings Ltd	PPH	2216	3.60	4.23	12.89	
Fairvest Limited B	FTB	440	3.53	4.02	27.91	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Karoo000 Ltd	KRO	65255	-6.03	0.38	37.38	
Gold Fields Ltd	GFI	25178	-3.77	-16.35	-9.36	
BID Corporation Ltd	BID	41627	-3.76	-4.98	-2.43	
Transaction Capital Ltd	TCP	285	-3.72	-3.39	-64.29	
Aspen Pharmacare Hldgs Ltd	APN	22973	-2.42	-1.19	12.89	

DIVIDEND DATA

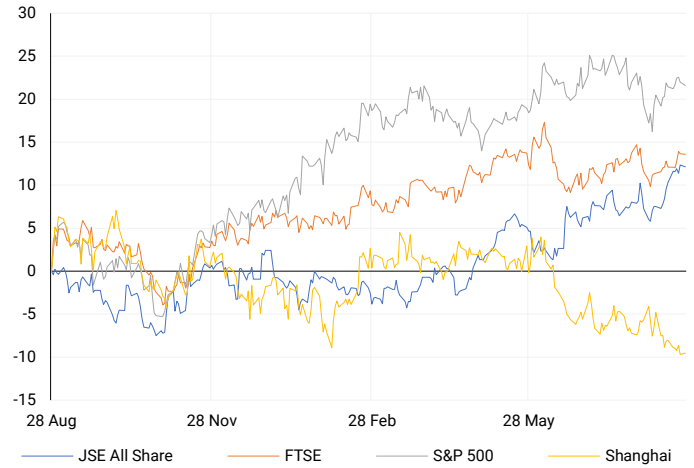
COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
Mpact	MPT	30 ZARc	Globe Trade Centre SA	GTC	22 PLN
RMB Holdings	RMH	3.75 ZARc	---	---	---
Primeserv Group	PMV	10 ZARc	---	---	---
AngloGold Ashanti plc	ANG	22 USDc	---	---	---
Quilter plc	QLT	1.7 GBPp	---	---	---

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

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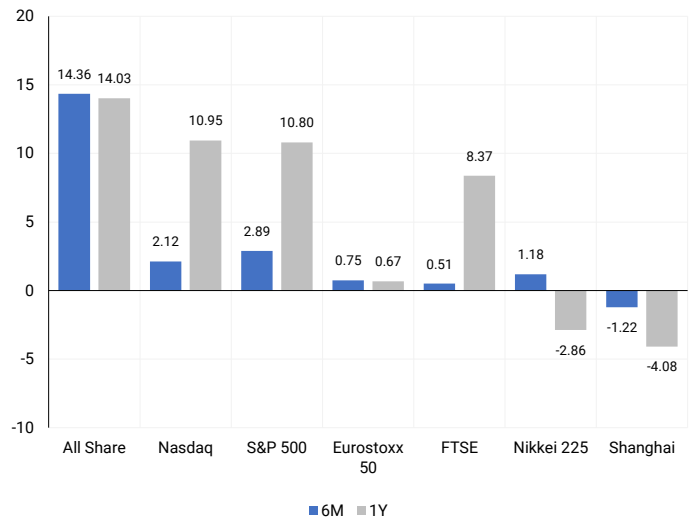
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



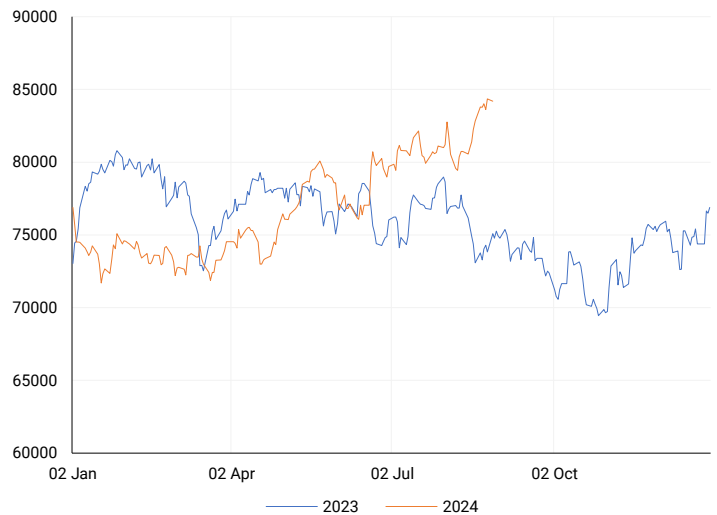
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



Last date to trade Tue, 27 August

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

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	17373	17084	1.69	4.92	6.62	6.12
Anglo American plc	53546	52871	1.28	3.61	-3.78	13.09
Anglo American Plat Ltd	68549	69555	-1.45	-0.71	-2.26	-28.89
Anglogold Ashanti Ltd	55445	55100	0.63	-0.52	11.37	56.89
Anheuser-Busch InBev SA NV	108925	109650	-0.66	0.72	-2.86	-9.24
BHP Group Limited	49169	48846	0.66	2.46	-1.92	-22.38
BID Corporation Ltd	41627	43252	-3.76	-4.98	-6.05	-2.43
British American Tob plc	64710	64675	0.05	0.84	1.08	19.50
Compagnie Fin Richemont	286268	288050	-0.62	2.98	2.91	11.49
Capitec Bank Hldgs Ltd	292500	288800	1.28	1.56	5.25	44.35
Discovery Ltd	15153	15322	-1.10	0.91	10.13	5.46
Firststrand Ltd	8552	8510	0.49	1.09	6.95	16.34
Gold Fields Ltd	25178	26164	-3.77	-16.35	-16.27	-9.36
Glencore plc	9601	9635	-0.35	0.07	-5.91	-14.01
Impala Platinum Hlgs Ltd	8830	8848	-0.20	-0.17	-2.60	-3.25
Kumba Iron Ore Ltd	36259	36049	0.58	-0.28	-9.99	-41.02
Mondi plc	34000	34253	-0.74	-0.17	-6.14	-6.34
MTN Group Ltd	9634	9593	0.43	6.71	24.70	-16.59
Naspers Ltd -N-	362346	370000	-2.07	-0.73	5.17	15.84
Prosus N.V.	65212	66374	-1.75	-0.87	3.35	16.37
South32 Limited	3753	3690	1.71	5.75	3.27	-11.05
Standard Bank Group Ltd	24058	23761	1.25	1.43	9.80	15.61
Shoprite Holdings Ltd	30744	30769	-0.08	-0.02	4.27	11.78
Sanlam Limited	8562	8567	-0.06	0.55	8.43	17.61
Sasol Limited	14794	14788	0.04	7.57	4.34	-20.16
Sibanye Stillwater Ltd	1926	1940	-0.72	0.78	-1.08	-22.65
Vodacom Group Ltd	11483	11368	1.01	7.04	16.34	8.33

SOUTH AFRICAN MARKET SUMMARY

SELECTED ITEMS

The Top-40 index on the South African stock market closed down by 0.33% on Monday. Investors are turning their attention to the upcoming releases of monthly producer inflation, money supply, budget, and trade balance data for insights into the health of the country's economy. Harmony Gold announced that it expects its profit for the full year ended June 30 to have likely doubled, driven by increased production, improved grades, and higher metal prices. Additionally, potential bidders have shown interest in acquiring AutoZone, a major automotive parts retailer and wholesaler in southern Africa, which entered voluntary business rescue on 1 July 2024.

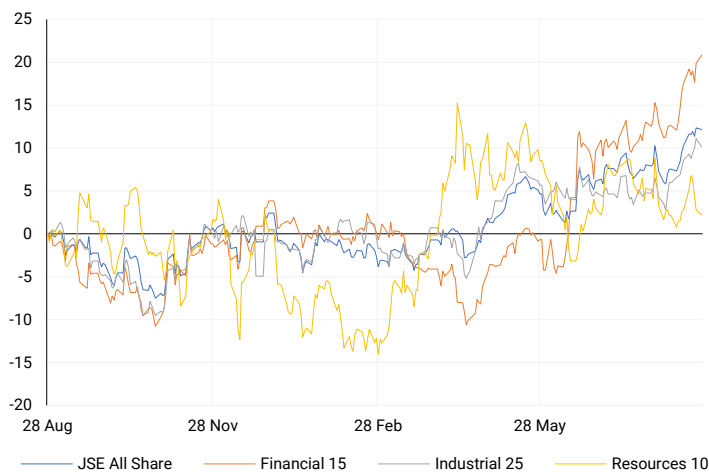
JSE ALL SHARE

One-year



LOCAL INDICES

Normalised percentage performances



EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
BHP	BHG	Final	27 Aug '24
Sibanye Stillwater	SSW	Interim	29 Aug '24
Santam	SNT	Interim	29 Aug '24
Truworths	TRU	Final	30 Aug '24
Bid Corporation	BID	Final	30 Aug '24

BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	8800	11.24	Thu, 06 Jun '24
Standard Bank	SBPP	9100	11.15	Thu, 05 Sep '24
Absa	ABSP	80259	11.48	Thu, 12 Sep '24
Capitec	CPIP	10010	9.69	Thu, 19 Sep '24
Steinhoff	SHFF	9734	10.47	Thu, 17 Oct '24
Grindrod	GNDP	9103	12.22	Thu, 19 Sep '24
Netcare	NTCP	8200	11.82	Thu, 31 Oct '24
Discovery	DSBP	9653	11.91	Thu, 19 Sep '24
Invicta	IVTP	---	13.41	Thu, 27 Jun '24

LOCAL SENS ANNOUNCEMENTS

SELECTED RELEASE

HARMONY GOLD MINING COMPANY LIMITED – Trading Statement

Harmony's shareholders are informed that the company's basic earnings for FY24 are expected to be significantly higher than those of FY23, mainly due to increased gross profit. Earnings per share (EPS) are projected to be at least 1 385 South African cents (or 72 US cents), marking a 78% increase in South African cents and a 64% increase in US cents compared to the previous year. Headline earnings per share (HEPS) are expected to be more than double, reaching at least 1 852 South African cents (or 98 US cents). This improved performance is driven by higher recovered grades, increased gold production, a higher average gold price, and additional gains from silver and uranium production at certain operations.

HAR | -0.75% OPEN | 19180c HIGH | 19180c LOW | 18299c CLOSE | 18519c TIME | 12:21

ADVTECH LIMITED – Interim Results

Revenue increased by 9% to R4 274 million, while operating profit rose by 15% to R865 million compared to the same period last year. Normalised earnings grew by 17% to R535 million, leading to a 16% increase in normalised earnings per share (NEPS) to 97.7 cents. Both headline earnings per share (HEPS) and earnings per share (EPS) also increased by 16% to 97.7 cents and 97.6 cents, respectively. Additionally, an interim dividend of 38.0 cents per share was declared, up from 30.0 cents per share in the previous period.

ADH | 0.70% OPEN | 3319c HIGH | 3390c LOW | 3285c CLOSE | 3330c TIME | 08:00

ITALTILE LIMITED – Reviewed Condensed Group Results

The company reported a system-wide turnover of R11.5 billion, remaining unchanged from the previous year. However, trading profit decreased by 11% to R2.1 billion, and earnings per share (EPS) dropped by 8% to 122.1 cents. Headline earnings per share (HEPS) also fell by 7% to 123.0 cents. The store network contracted by 4% to 208 stores. Despite these declines, the ordinary dividend per share decreased by 8% to 49.0 cents, while a special dividend per share increased by 100% to 78.0 cents, bringing the total dividend per share up by 140% to 127.0 cents. Additionally, the net asset value per share rose by 10% to 707.5 cents, and cash and cash equivalents surged by 76% to R1.8 billion.

ITE | 1.01% OPEN | 1270c HIGH | 1323c LOW | 1270c CLOSE | 1305c TIME | 07:15

STADIO HOLDINGS LIMITED – Results

For the six months ended 30 June 2024, revenue increased by 16% from R714 million to R826 million. Student numbers in Semester 1 grew by 10%, and overall student numbers rose by 9% from August 2023 to August 2024. Earnings before interest, taxation, depreciation, and amortisation (EBITDA) increased by 12% to R236 million. Earnings per share (EPS) and headline earnings per share (HEPS) both grew by 20%, reaching 16.3 cents and 16.2 cents, respectively. Core headline earnings rose by 19% to R137 million, and core headline earnings per share (Core HEPS) also increased by 19% to 16.2 cents. Net asset value per share saw a modest rise of 2% to 216 cents. No interim dividend was declared for the period.

SDO | 6.31% OPEN | 600c HIGH | 600c LOW | 566c CLOSE | 590c TIME | 07:05

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmacare Hldgs Ltd	APN	22973	23542	-2.42	-4.68	12.89
African Rainbow Min Ltd	ARI	18837	19035	-1.04	-13.11	-5.82
AVI Ltd	AVI	10158	10150	0.08	4.86	23.77
Barloworld Ltd	BAW	9424	9471	-0.50	0.48	19.29
Bidvest Ltd	BVT	28688	28570	0.41	6.25	13.71
Bytes Technology Grp PLC	BYI	11290	11040	2.26	-2.23	-21.16
Capital&Counties Prop plc	CCO	3430	3443	-0.38	-1.75	5.54
Clicks Group Ltd	CLS	36433	36768	-0.91	7.52	11.86
Dis-Chem Pharmacies Ltd	DCP	3622	3652	-0.82	1.57	18.02
Exxaro Resources Ltd	EXX	16500	16792	-1.74	-15.28	-19.31
Fortress Real Est INV B	FFB	1840	1830	0.55	8.94	28.13
Growthpoint Prop Ltd	GRT	1381	1368	0.95	13.57	18.24
Harmony GM Co Ltd	HAR	18519	18659	-0.75	13.37	54.85
Hammerson plc	HMM	684	675	1.33	2.09	0.59
Investec Ltd	INL	13593	13490	0.76	-3.18	8.23
Investec plc	INP	13622	13425	1.47	-4.10	8.15
Italtile Ltd	ITE	1305	1292	1.01	14.37	16.52
Life Healthc Grp Hldgs Ltd	LHC	1408	1406	0.14	10.00	-23.35
MultiChoice Group Ltd	MCG	11000	11170	-1.52	0.77	35.77
Montauk Renewables Inc	MKR	8103	8160	-0.70	-27.65	-52.89
Mr Price Group Ltd	MRP	24114	23815	1.26	14.01	53.78
Momentum Met Hldgs Ltd	MTM	2797	2778	0.68	9.90	27.78
Ninety One Plc	N91	3904	3942	-0.96	-2.96	-9.46
Nedbank Group Ltd	NED	29432	29156	0.95	9.43	36.11
Northam Platinum Hldgs Ltd	NPH	12502	12516	-0.11	-7.97	-10.97
NEPI Rockcastle N.V.	NRP	14259	14150	0.77	6.21	12.83
Netcare Limited	NTC	1375	1368	0.51	10.89	-3.44
Ninety One Limited	NY1	3871	3900	-0.74	-1.22	-9.91
Old Mutual Limited	OMU	1277	1270	0.55	6.86	-2.22
OUTsurance Group Ltd	OUT	4791	4757	0.71	1.29	13.53
Pick n Pay Stores Ltd	PIK	2413	2403	0.42	1.56	3.70
Pepkor Holdings Ltd	PPH	2216	2139	3.60	12.32	12.89
Quilter Plc	QLT	3316	3380	-1.89	10.53	36.57
Redefine Properties Ltd	RDF	475	458	3.71	15.57	23.38
Remgro Ltd	REM	14343	14239	0.73	6.21	-11.72
Resilient REIT Limited	RES	5658	5502	2.84	15.05	27.75
Reinet Investments S.C.A	RNI	48206	48602	-0.81	1.38	3.40
Sappi Ltd	SAP	4584	4697	-2.41	-16.50	3.71
Santam Limited	SNT	36050	35855	0.54	13.08	25.80
The Spar Group Ltd	SPP	12615	12650	-0.28	0.81	7.00
Sirius Real Estate Ltd	SRE	2305	2277	1.23	3.60	4.06
Tiger Brands Ltd	TBS	23732	23296	1.87	7.87	17.90
Transaction Capital Ltd	TCP	285	296	-3.72	0.00	-64.29
The Foschini Group Limited	TFG	14627	14547	0.55	8.35	31.82
Thungela Resources Ltd	TGA	12001	12168	-1.37	-2.95	-21.97
Telkom SA SOC Ltd	TKG	2713	2694	0.71	15.45	-8.78
Truworths Int Ltd	TRU	10032	10048	-0.16	12.59	34.93
Woolworths Holdings Ltd	WHL	6559	6532	0.41	14.39	-9.16
Zeda Limited	ZZD	1289	1271	1.42	3.12	1.10

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	119	123	-3.25	-13.77	-27.44
ADVTECH Ltd	ADH	3330	3307	0.70	10.59	35.70
Altron Limited A	AEL	1755	1769	-0.79	6.36	71.22
AECI Limited	AFE	10854	10868	-0.13	7.47	-1.05
Alexander Forbes Grp Hldgs	AFH	682	678	0.59	5.57	3.33
Afrimat Limited	AFT	6734	6536	3.03	-0.63	6.89
African Rainbow Cap Inv	AIL	618	610	1.31	-3.29	26.38
Adcock Ingram Hldgs Ltd	AIP	6707	6752	-0.67	12.63	11.60
Astral Foods Ltd	ARL	17300	17300	0.00	1.28	18.03
Attacq Limited	ATT	1144	1130	1.24	4.86	24.08
Brait PLC	BAT	114	107	6.54	44.30	-37.36
Blue Label Telecoms Ltd	BLU	537	518	3.67	24.59	38.40
Burststone Group	BTN	809	798	1.38	3.72	1.13
Coronation Fund Mngrs Ld	CML	4008	3962	1.16	6.88	28.63
Curro Holdings Limited	COH	1315	1300	1.15	8.77	12.88
Cashbuild Ltd	CSB	16625	16700	-0.45	-1.77	-0.41
DRD Gold Ltd	DRD	1550	1573	-1.46	-13.65	-1.71
Datatec Ltd	DTC	3580	3580	0.00	1.16	-11.60
Emira Property Fund Ltd	EMI	1085	1067	1.69	1.78	26.90
Equites Prop Fund Ltd	EQU	1382	1351	2.29	7.05	-0.93
Famous Brands Ltd	FBR	5712	5695	0.30	4.39	-1.40
Fairvest Limited B	FTB	440	425	3.53	11.39	27.91
Grindrod Ltd	GND	1489	1512	-1.52	-5.52	29.93
Hosken Cons Inv Ltd	HCI	18908	18550	1.93	-1.01	-6.67
Hudaco Industries Ltd	HDC	18759	18550	1.13	4.22	16.78
Hyprop Inv Ltd	HYP	3755	3680	2.04	20.47	20.70
JSE Ltd	JSE	11523	11399	1.09	8.81	24.65
KAP Industrial Hldgs Ltd	KAP	326	330	-1.21	10.14	24.43
Karooooo Ltd	KRO	65255	69445	-6.03	6.97	37.38
PSG Konsult Limited	KST	1725	1708	1.00	1.35	12.38
Libstar Holdings Ltd	LBR	422	432	-2.31	10.76	20.57
Lighthouse Properties plc	LTE	824	822	0.24	2.87	12.11
Industrials REIT Limited	MLI	1.6	1.6	0.00	23.08	128.57
MAS P.L.C	MSP	1730	1720	0.58	-2.86	-0.06
Metair Investments Ltd	MTA	1425	1375	3.64	2.52	-19.72
Motus Holdings Ltd	MTH	11544	11453	0.79	12.62	13.73
Murray & Roberts Hldgs	MUR	326	314	3.82	19.41	118.79
Oceana Group Ltd	OCE	7050	7053	-0.04	2.17	-0.24
Omnia Holdings Ltd	OMN	6319	6431	-1.74	-4.98	-3.33
Pan African Resource plc	PAN	727	713	1.96	9.49	77.75
PPC Limited	PPC	410	407	0.74	7.05	2.76
Raubex Group Ltd	RBX	4907	4800	2.23	6.56	77.02
RFG Holdings Limited	RFG	1629	1650	-1.27	6.47	20.67
Reunert Ltd	RLO	7671	7650	0.27	4.87	27.98
SA Corp Real Estate Ltd	SAC	274	274	0.00	0.37	18.10
Super Group Ltd	SPG	2658	2690	-1.19	-10.20	-10.66
Stor-Age Prop REIT Ltd	SSS	1405	1400	0.36	5.24	7.58
Southern Sun LTD	SSU	640	646	-0.93	10.15	21.90
Sun International Ltd	SUI	4103	4117	-0.34	11.40	0.07
Tharisa plc	THA	1974	1932	2.17	1.23	30.64
Tsogo Sun Gaming Ltd	TSG	1161	1171	-0.85	5.16	-5.22
Vukile Property Fund Ltd	VKE	1772	1756	0.91	7.13	25.50
Wilson Bayly Hlm-Ovc Ltd	WBO	20040	19500	2.77	11.33	54.08

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

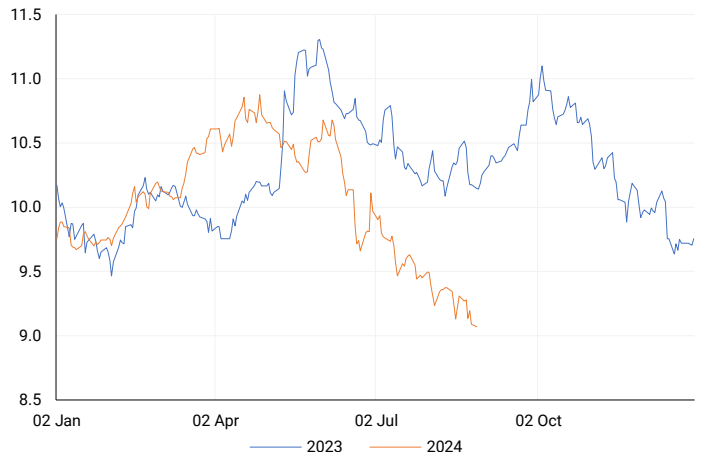
REGION	YIELD	1D	1M	1Y
United States	3.82%	2	-38	--
United Kingdom	3.94%	3	-16	-50
Germany	2.24%	2	-16	-31
Japan	0.87%	-2	-18	--
South African 10Y	9.09%	1	-42	-108

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%

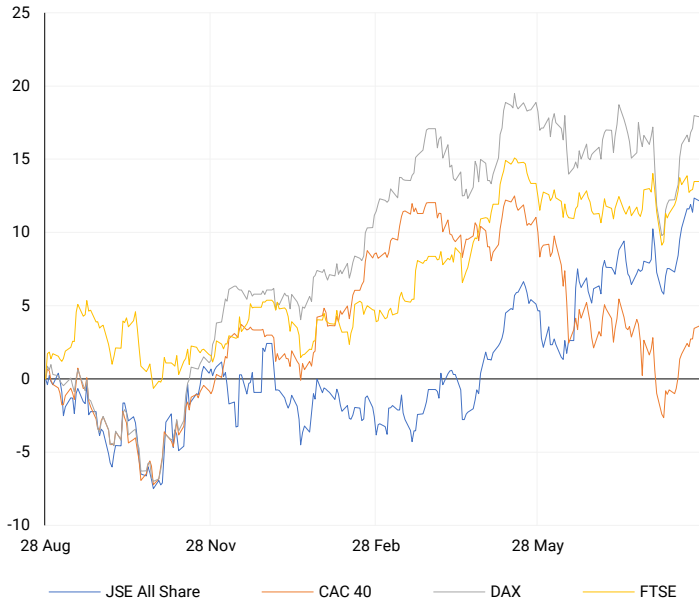
SOUTH AFRICAN 10-YEAR

2023 vs 2024 to date



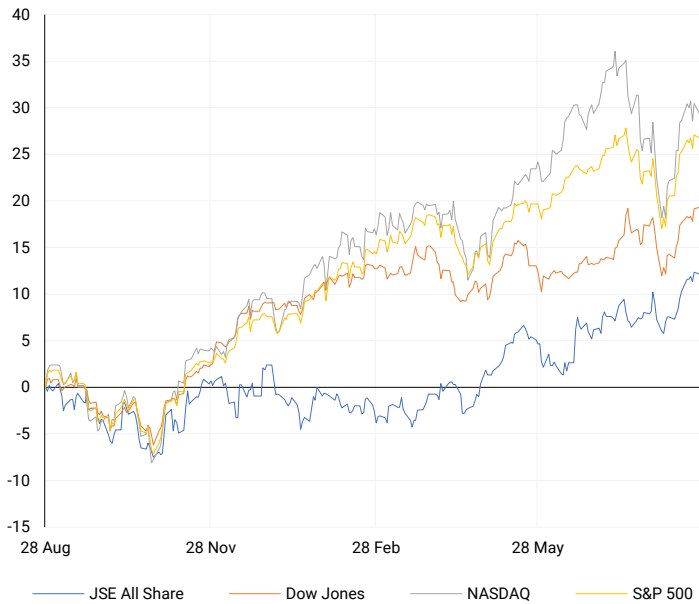
EUROPEAN INDICES

Normalised percentage performances



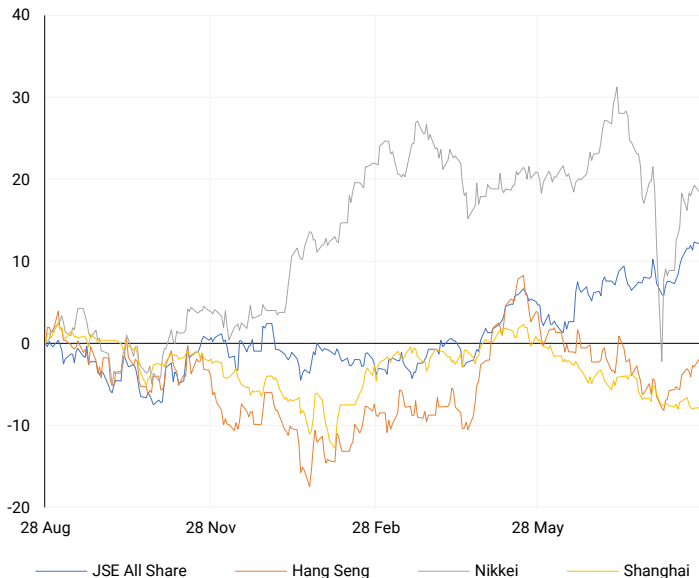
AMERICAN INDICES

Normalised percentage performances



ASIAN INDICES

Normalised percentage performances

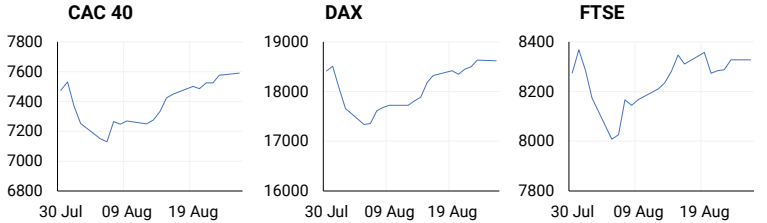


EUROPEAN MARKET SUMMARY

SELECTED ITEMS

European stocks ended Monday with mixed results. In Germany, the Ifo survey revealed a decline in business sentiment for August, with the Ifo Business Climate Index falling to 86.6 points from 87.0 points in July, highlighting ongoing economic struggles. Investors are also looking ahead to the eurozone inflation data set to be released on Friday, which could provide clues on whether the European Central Bank might further cut interest rates next month.

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7590.37	7577.04	0.18	1.18	0.97	0.63
DAX 30	18617.02	18633.10	-0.09	1.06	1.08	11.14
Eurostoxx 50	4897.00	4907.55	-0.21	0.48	0.75	8.30
FTSE	8327.78	8327.78	0.00	-0.35	0.51	7.69



AMERICAN MARKET SUMMARY

SELECTED ITEMS

On Monday, the S&P 500 index fell, with major AI company Nvidia's shares declining ahead of its upcoming quarterly report. Investors are closely watching new inflation data for clues about possible interest rate cuts by the Federal Reserve. According to the CME Group's FedWatch tool, there is a 70% chance of a 0.25% rate cut and a 30% chance of a 0.50% cut in September. Additionally, the important Personal Consumption Expenditure (PCE) report for July, which the Fed uses to measure inflation, is expected on Friday and could provide further insights into future policy decisions.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	41240.52	41175.08	0.16	0.84	1.60	9.42
Nasdaq	17725.77	17877.79	-0.85	-0.84	2.12	18.08
S&P 500	5616.84	5634.61	-0.32	0.15	2.89	17.76
US VIX	16.15	15.86	1.83	10.24	-1.46	29.72

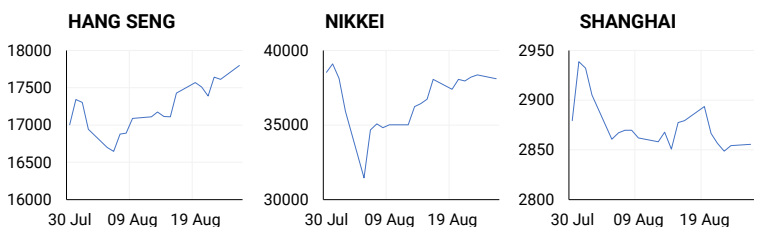


ASIAN MARKET SUMMARY

SELECTED ITEMS

Asia-Pacific markets mostly declined this morning, following the losses in the S&P 500 and Nasdaq from last night. Investors were also digesting industrial profit data from China, which showed a slight improvement with profits rising by 3.6% year-on-year from January to July, up from 3.5% growth in the January to June period.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17798.73	17612.10	1.06	1.30	4.57	4.41
Nikkei 225	38110.22	38364.27	-0.66	1.93	1.18	13.88
Shanghai	2855.52	2854.37	0.04	-1.32	-1.22	-4.01



COMMODITIES MARKET SUMMARY

SELECTED ITEMS

Gold prices surged on Monday, nearing their recent record high, driven by strong expectations of a September interest rate cut after dovish comments from Federal Reserve Chair Jerome Powell and increased safe-haven demand due to geopolitical tensions in the Middle East. Meanwhile, oil prices paused their recent rally, pulling back in Asian trading this morning after climbing more than 7% over the previous three sessions due to supply concerns related to fears of a broader Middle East conflict and the shutdown of Libyan oil fields.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	81.23	81.23	0.00	2.73	4.45	5.38
Gold	2508.72	2518.10	-0.37	0.22	0.55	22.06
Palladium	947.50	963.25	-1.64	0.38	2.93	-12.21
Platinum	954.80	963.15	-0.87	-0.33	0.26	-2.44
Silver	29.90	29.91	-0.03	0.23	1.56	25.74

BRENT CRUDE

One-year



PLATINUM

One-year



GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	17.72	17.73	-0.03	-0.04	0.13	-3.27
GBPZAR	23.38	23.39	-0.06	-0.07	1.71	0.41
EURZAR	19.79	19.80	-0.02	-0.17	0.87	-1.95
AUDZAR	12.02	12.01	0.09	-0.14	0.76	-3.60
EURUSD	1.12	1.12	0.06	-0.28	0.68	1.12
USDJPY	144.76	144.52	0.17	0.12	-1.41	2.47
GBPUSD	1.32	1.32	0.03	-0.20	1.50	3.58
USDCHF	0.85	0.85	-0.01	-0.09	-1.80	0.68

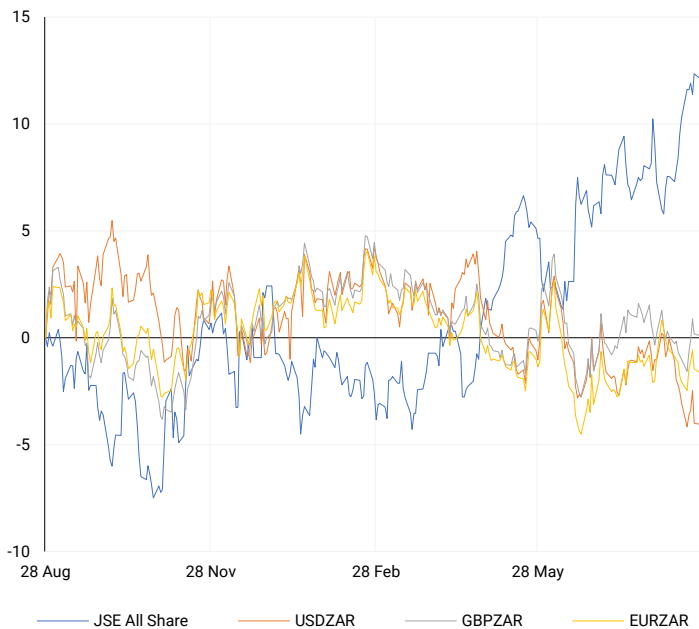
CURRENCY MARKET SUMMARY

SELECTED ITEMS

South Africa's rand remained stable on Monday as the market awaited upcoming economic data releases that could provide insights into the state of the local economy. The dollar edged higher this morning, while major currencies mostly traded sideways. Ongoing concerns about tensions in the Middle East tempered investors' optimism about potential U.S. interest rate cuts in the near future.

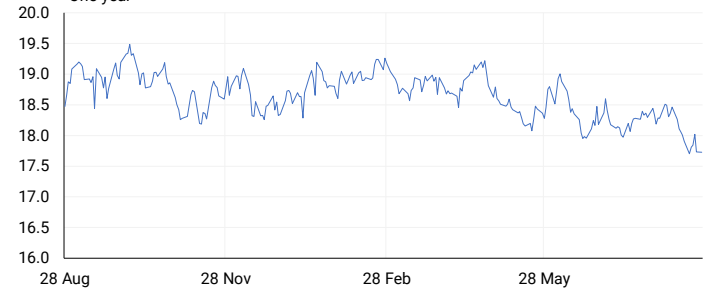
CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



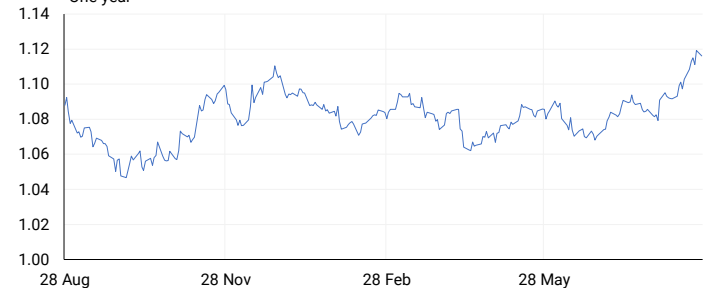
USDZAR

One-year



EURUSD

One-year



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

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