

GLOBAL OVERVIEW | SELECTED INDICES

| SOUTH AFRICAN INDICES | | | | | | |
|-----------------------|-----------|-----------|------|-------|-------|-------|
| | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
| All Share | 84553.54 | 84193.95 | 0.43 | 0.92 | 4.23 | 9.96 |
| Top 40 | 77095.92 | 76716.86 | 0.49 | 0.60 | 4.12 | 9.36 |
| Financial 15 | 20926.19 | 20797.39 | 0.62 | 2.60 | 7.60 | 17.08 |
| Industrial 25 | 114172.33 | 113668.91 | 0.44 | 1.68 | 5.61 | 10.08 |
| Resource 10 | 58668.03 | 58596.44 | 0.12 | -4.18 | -2.83 | 1.97 |
| Mid Cap | 89070.47 | 88736.49 | 0.38 | 1.03 | 4.80 | 10.76 |
| Small Cap | 85493.01 | 85195.01 | 0.35 | 3.33 | 6.11 | 17.93 |
| Banks | 13298.49 | 13190.58 | 0.82 | 2.61 | 7.60 | 21.47 |
| Retailers | 7453.25 | 7449.50 | 0.05 | 4.15 | 12.46 | 19.57 |
| Property (J253) - TR | 2303.38 | 2280.82 | 0.99 | 4.50 | 10.10 | 23.59 |

| AMERICAN INDICES | | | | | | |
|------------------|----------|----------|-------|-------|-------|-------|
| | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
| Dow Jones | 41250.50 | 41240.52 | 0.02 | 1.02 | 1.63 | 9.45 |
| Nasdaq | 17754.82 | 17725.77 | 0.16 | -0.35 | 2.29 | 18.28 |
| S&P 500 | 5625.80 | 5616.84 | 0.16 | 0.51 | 3.05 | 17.95 |
| US VIX | 15.43 | 16.15 | -4.46 | -2.83 | -5.86 | 23.94 |

| EUROPEAN INDICES | | | | | | |
|------------------|----------|----------|-------|------|------|-------|
| | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
| CAC 40 | 7565.78 | 7590.37 | -0.32 | 1.07 | 0.64 | 0.30 |
| DAX 30 | 18681.81 | 18617.02 | 0.35 | 1.81 | 1.43 | 11.52 |
| Eurostoxx 50 | 4901.80 | 4897.00 | 0.10 | 0.88 | 0.85 | 8.41 |
| FTSE | 8345.46 | 8327.78 | 0.21 | 0.87 | 0.72 | 7.92 |

| ASIAN INDICES | | | | | | |
|---------------|----------|----------|-------|-------|-------|-------|
| | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
| Hang Seng | 17874.67 | 17798.73 | 0.43 | 2.08 | 5.01 | 4.85 |
| Nikkei 225 | 38288.62 | 38110.22 | 0.47 | 0.59 | 1.65 | 14.42 |
| Shanghai | 2848.73 | 2855.52 | -0.24 | -0.63 | -1.46 | -4.24 |

| EARLY MORNING MARKETS | | | | | | |
|-----------------------|---------|---------|-------|-------|------|--------|
| | LAST | CLOSE | % CHG | 1D% | 5D% | YTD% |
| TENCENT | 374.60 | 381.80 | -1.89 | -0.05 | 3.08 | 31.56 |
| BHP AUS | 4069.00 | 4135.00 | -1.60 | 1.25 | 2.73 | -17.97 |

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

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

| TIME | AREA | TODAY'S EVENTS & RELEASES | PERIOD | EXP. | PREV. |
|-------|------|---------------------------|--------|--------|-------|
| 7:15 | US | Fed Waller Speech | --- | --- | --- |
| 16:30 | US | Crude Oil Inventories | Aug | -4.65M | --- |
| --- | --- | --- | --- | --- | --- |
| --- | --- | --- | --- | --- | --- |
| --- | --- | --- | --- | --- | --- |

| TIME | AREA | PREVIOUS SESSION'S RELEASES | PERIOD | EXP. | ACT. |
|-------|------|------------------------------|--------|--------|--------|
| 16:00 | US | CB Consumer Confidence | Aug | 100.50 | 103.30 |
| 16:00 | US | Richmond Manufacturing Index | Aug | -15.00 | -19.00 |
| --- | --- | --- | --- | --- | --- |
| --- | --- | --- | --- | --- | --- |
| --- | --- | --- | --- | --- | --- |

JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

| BEST ONE-DAY % PERFORMERS | | | | | | |
|---------------------------|------|-------|------|-------|--------|--|
| | CODE | CLOSE | 1D% | 5D% | YTD% | |
| Metair Investments Ltd | MTA | 1498 | 5.12 | 13.74 | -15.61 | |
| Montauk Renewables Inc | MKR | 8375 | 3.36 | 3.14 | -51.31 | |
| JSE Ltd | JSE | 11900 | 3.27 | 8.51 | 28.73 | |
| Telkom SA SOC Ltd | TKG | 2782 | 2.54 | 10.27 | -6.46 | |
| Resilient REIT Limited | RES | 5783 | 2.21 | 9.53 | 30.57 | |
| Burstone Group Limited | BTN | 826 | 2.10 | 3.25 | 3.25 | |

| WORST ONE-DAY % PERFORMERS | | | | | | |
|----------------------------|------|-------|-------|-------|--------|--|
| | CODE | CLOSE | 1D% | 5D% | YTD% | |
| Brait PLC | BAT | 109 | -4.39 | 14.74 | -40.11 | |
| Adcock Ingram Hldgs Ltd | AIP | 6441 | -3.97 | 9.99 | 7.17 | |
| Italtile Ltd | ITE | 1269 | -2.76 | 1.12 | 13.30 | |
| AngloGold Ashanti plc | ANG | 54181 | -2.28 | -5.14 | 53.31 | |
| Bytes Technology Grp PLC | BYI | 11049 | -2.13 | -0.81 | -22.85 | |

DIVIDEND DATA

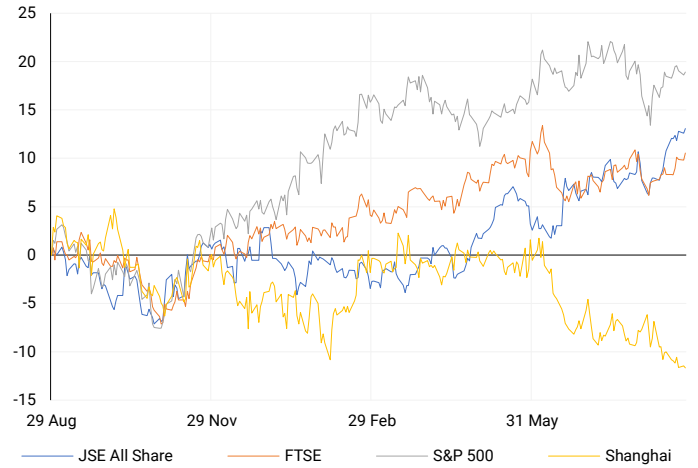
| COMPANY | CODE | EXPECTED DIVIDEND | COMPANY | CODE | EXPECTED DIVIDEND |
|-----------------------|------|-------------------|-----------------------|------|-------------------|
| Mpact | MPT | 30 ZARc | Globe Trade Centre SA | GTC | 22 PLN |
| RMB Holdings | RMH | 3.75 ZARc | --- | --- | --- |
| Primeserv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

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

PLEASE SEE THE BOTTOM OF THE LAST PAGE FOR THE FULL DISCLAIMER

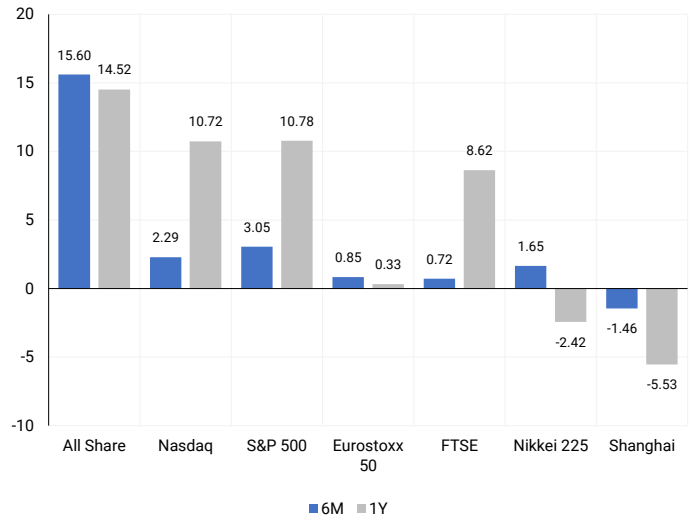
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



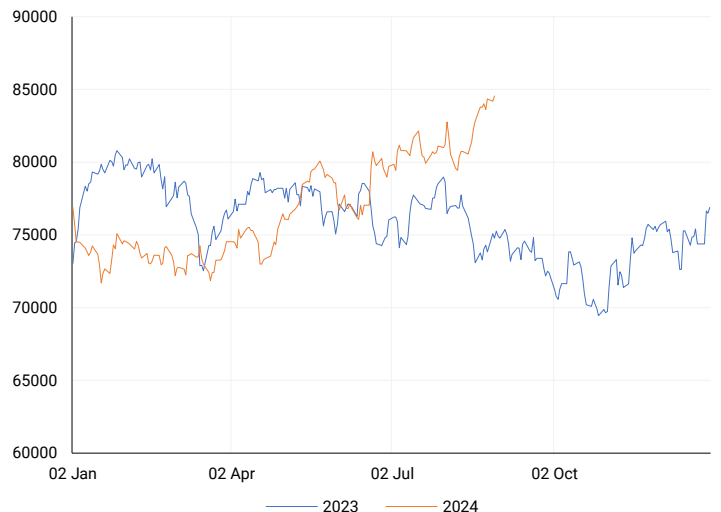
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



Ex div Wed, 28 August

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

| COMPANY | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
|----------------------------|--------|----------|-------|--------|--------|--------|
| Absa Group Limited | 17595 | 17373 | 1.28 | 7.14 | 7.98 | 7.48 |
| Anglo American plc | 53860 | 53546 | 0.59 | 2.96 | -3.21 | 13.75 |
| Anglo American Plat Ltd | 69061 | 68549 | 0.75 | -2.80 | -1.53 | -28.36 |
| Anglogold Ashanti Ltd | 54181 | 55445 | -2.28 | -5.14 | 8.83 | 53.31 |
| Anheuser-Busch InBev SA NV | 109993 | 108925 | 0.98 | 1.82 | -1.90 | -8.35 |
| BHP Group Limited | 49496 | 49169 | 0.67 | 3.22 | -1.26 | -21.86 |
| BID Corporation Ltd | 42090 | 41627 | 1.11 | -2.26 | -5.01 | -1.35 |
| British American Tob plc | 65370 | 64710 | 1.02 | 1.44 | 2.11 | 20.72 |
| Compagnie Fin Richemont | 283688 | 286268 | -0.90 | 0.20 | 1.98 | 10.49 |
| Capitec Bank Hldgs Ltd | 295850 | 292500 | 1.15 | 2.73 | 6.46 | 46.00 |
| Discovery Ltd | 15218 | 15153 | 0.43 | 1.92 | 10.60 | 5.92 |
| Firststrand Ltd | 8620 | 8552 | 0.80 | 2.69 | 7.80 | 17.26 |
| Gold Fields Ltd | 25535 | 25178 | 1.42 | -17.92 | -15.09 | -8.07 |
| Glencore plc | 9701 | 9601 | 1.04 | 1.50 | -4.93 | -13.11 |
| Impala Platinum Hlgs Ltd | 8940 | 8830 | 1.25 | -1.03 | -1.39 | -2.05 |
| Kumba Iron Ore Ltd | 36248 | 36259 | -0.03 | 0.35 | -10.02 | -41.04 |
| Mondi plc | 34435 | 34000 | 1.28 | 1.36 | -4.94 | -5.14 |
| MTN Group Ltd | 9600 | 9634 | -0.35 | 7.26 | 24.26 | -16.88 |
| Naspers Ltd -N- | 364414 | 362346 | 0.57 | 0.65 | 5.77 | 16.50 |
| Prosus N.V. | 65508 | 65212 | 0.45 | 0.09 | 3.82 | 16.90 |
| South32 Limited | 3714 | 3753 | -1.04 | 3.74 | 2.20 | -11.97 |
| Standard Bank Group Ltd | 24219 | 24058 | 0.67 | 2.62 | 10.54 | 16.38 |
| Shoprite Holdings Ltd | 31094 | 30744 | 1.14 | 2.84 | 5.46 | 13.05 |
| Sanlam Limited | 8525 | 8562 | -0.43 | 1.33 | 7.97 | 17.10 |
| Sasol Limited | 14510 | 14794 | -1.92 | 12.80 | 2.34 | -21.69 |
| Sibanye Stillwater Ltd | 1939 | 1926 | 0.67 | -1.72 | -0.41 | -22.13 |
| Vodacom Group Ltd | 11441 | 11483 | -0.37 | 5.94 | 15.92 | 7.93 |

SOUTH AFRICAN MARKET SUMMARY

SELECTED ITEMS

On the Johannesburg Stock Exchange, the blue-chip Top-40 index closed about 0.5% higher. 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.

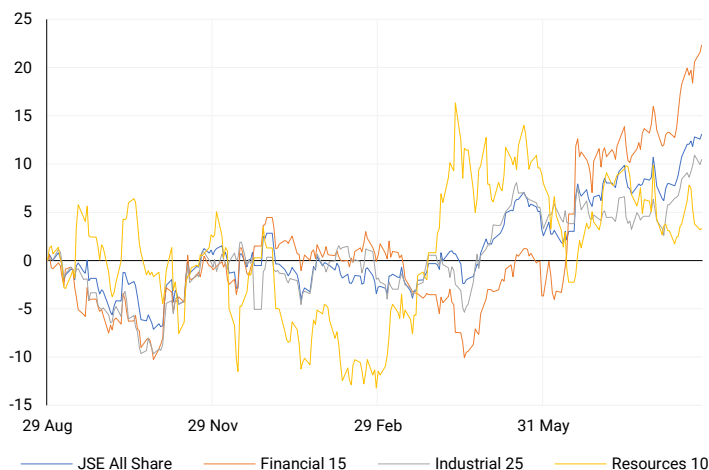
JSE ALL SHARE

One-year



LOCAL INDICES

Normalised percentage performances



EXPECTED COMPANY REPORTING SCHEDULE

| COMPANY | CODE | RELEASE | DATE |
|--------------------|------|---------|------------|
| 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 |
| Northam | NPH | 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 | 8915 | 11.15 | Thu, 05 Sep '24 |
| Absa | ABSP | 81500 | 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 | 9224 | 12.22 | Thu, 19 Sep '24 |
| Netcare | NTCP | 8171 | 11.82 | Thu, 31 Oct '24 |
| Discovery | DSBP | 9600 | 11.91 | Thu, 19 Sep '24 |
| Invicta | IVTP | --- | 13.41 | Thu, 27 Jun '24 |

LOCAL SENS ANNOUNCEMENTS

SELECTED RELEASE

WILSON BAYLY HOLMES – OVCON LIMITED – Trading Statement

The Group expects to report higher earnings for the year ended 30 June 2024. For continuing operations, earnings per share (EPS) are projected to increase by 5% to 15%, ranging between 1 763 and 1 931 cents, while headline earnings per share (HEPS) are expected to rise by 10% to 20%, reaching between 1 873 and 2 044 cents. For total operations, EPS is anticipated to grow by 15% to 25%, ranging between 1 714 and 1 862 cents, and HEPS by 25% to 35%, reaching between 1 894 and 2 045 cents, compared to the previous year's figures.

WBO | -0.20% OPEN | 20000c HIGH | 20245c LOW | 19799c CLOSE | 20000c TIME | 15:27

MASTER DRILLING GROUP LIMITED – Unaudited Interim Report

For the six months ended 30 June 2024, the company reported a 17.3% increase in revenue, rising from \$108.2 million to \$127.0 million. However, profit dropped sharply by 75.1%, falling from \$14.6 million to \$3.6 million. Headline earnings per share (HEPS) in USD decreased by 3.2%, while in ZAR terms, it saw a slight dip of 0.5%. Basic earnings per share (EPS) experienced a significant decline of 78.7% in USD and 78.1% in ZAR. On a positive note, net asset value per share in USD rose by 8.0%, and net cash from operating activities surged by 119.8%. The company has a revenue pipeline of \$599.6 million and a committed order book of \$271.4 million. No interim dividend was declared, in line with past practice, but a dividend of 52.5 cents per share in ZAR for FY2023 was paid in May 2024.

MDI | 3.43% OPEN | 1140c HIGH | 1222c LOW | 1140c CLOSE | 1175c TIME | 07:05

SEA HARVEST GROUP LIMITED – Unaudited Interim Results

For the six months ended 30 June 2024, the company's revenue increased by 3% to R3.3 billion, with international revenue making up 53% of the total, up from 45% the previous year. Gross profit rose by 22% to R944 million, improving the gross profit margin from 24% to 29%. Operating profit grew by 23% to R311 million, with the operating profit margin increasing to 9%. Earnings before interest and tax (EBIT) saw a 6% rise to R373 million, maintaining an EBIT margin of 11%. However, profit after tax decreased by 7% to R185 million, and profit attributable to shareholders dropped by 17% to R176 million. Headline earnings fell by 32% to R144 million. Basic earnings per share (EPS) declined by 21% to 61 cents, while basic headline earnings per share (HEPS) dropped by 36% to 50 cents. Net asset value (NAV) per share increased by 15% to 1 354 cents.

SHG | -0.72% OPEN | 822c HIGH | 832c LOW | 790c CLOSE | 832c TIME | 07:05

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

| COMPANY | CODE | CLOSE | PREVIOUS | 1D% | 1M% | YTD% |
|----------------------------|------|-------|----------|-------|--------|--------|
| Aspen Pharmacare Hldgs Ltd | APN | 23205 | 22973 | 1.01 | -3.72 | 14.03 |
| African Rainbow Min Ltd | ARI | 18992 | 18837 | 0.82 | -12.39 | -5.04 |
| AVI Ltd | AVI | 10134 | 10158 | -0.24 | 4.61 | 23.48 |
| Barloworld Ltd | BAW | 9400 | 9424 | -0.25 | 0.22 | 18.99 |
| Bidvest Ltd | BVT | 29039 | 28688 | 1.22 | 7.55 | 15.10 |
| Bytes Technology Grp PLC | BYI | 11049 | 11290 | -2.13 | -4.31 | -22.85 |
| Capital&Counties Prop plc | CCO | 3448 | 3430 | 0.52 | -1.23 | 6.09 |
| Clicks Group Ltd | CLS | 36551 | 36433 | 0.32 | 7.86 | 12.22 |
| Dis-Chem Pharmacies Ltd | DCP | 3634 | 3622 | 0.33 | 1.91 | 18.41 |
| Exxaro Resources Ltd | EXX | 16250 | 16500 | -1.52 | -16.56 | -20.53 |
| Fortress Real Est INV B | FFB | 1878 | 1840 | 2.07 | 11.19 | 30.78 |
| Growthpoint Prop Ltd | GRT | 1405 | 1381 | 1.74 | 15.54 | 20.29 |
| Harmony GM Co Ltd | HAR | 18622 | 18519 | 0.56 | 14.00 | 55.72 |
| Hammerson plc | HMN | 683 | 684 | -0.15 | 1.94 | 0.44 |
| Investec Ltd | INL | 13707 | 13593 | 0.84 | -2.37 | 9.14 |
| Investec plc | INP | 13702 | 13622 | 0.59 | -3.53 | 8.79 |
| Italtile Ltd | ITE | 1269 | 1305 | -2.76 | 11.22 | 13.30 |
| Life Healthc Grp Hldgs Ltd | LHC | 1400 | 1408 | -0.57 | 9.38 | -23.79 |
| MultiChoice Group Ltd | MCG | 11098 | 11000 | 0.89 | 1.67 | 36.98 |
| Montauk Renewables Inc | MKR | 8375 | 8103 | 3.36 | -25.22 | -51.31 |
| Mr Price Group Ltd | MRP | 24383 | 24114 | 1.12 | 15.28 | 55.49 |
| Momentum Met Hldgs Ltd | MTM | 2809 | 2797 | 0.43 | 10.37 | 28.32 |
| Ninety One Plc | N91 | 3911 | 3904 | 0.18 | -2.78 | -9.30 |
| Nedbank Group Ltd | NED | 29500 | 29432 | 0.23 | 9.68 | 36.43 |
| Northam Platinum Hldgs Ltd | NPH | 12550 | 12502 | 0.38 | -7.62 | -10.63 |
| NEPI Rockcastle N.V. | NRP | 14325 | 14259 | 0.46 | 6.70 | 13.35 |
| Netcare Limited | NTC | 1351 | 1375 | -1.75 | 8.95 | -5.13 |
| Ninety One Limited | NY1 | 3881 | 3871 | 0.26 | -0.97 | -9.68 |
| Old Mutual Limited | OMU | 1278 | 1277 | 0.08 | 6.95 | -2.14 |
| OUTsurance Group Ltd | OUT | 4704 | 4791 | -1.82 | -0.55 | 11.47 |
| Pick n Pay Stores Ltd | PIK | 2392 | 2413 | -0.87 | 0.67 | 2.79 |
| Pepkor Holdings Ltd | PPH | 2202 | 2216 | -0.63 | 11.61 | 12.18 |
| Quilter Plc | QLT | 3336 | 3316 | 0.60 | 11.20 | 37.40 |
| Redefine Properties Ltd | RDF | 478 | 475 | 0.63 | 16.30 | 24.16 |
| Remgro Ltd | REM | 14384 | 14343 | 0.29 | 6.52 | -11.47 |
| Resilient REIT Limited | RES | 5783 | 5658 | 2.21 | 17.59 | 30.57 |
| Reinet Investments S.C.A | RNI | 48591 | 48206 | 0.80 | 2.19 | 4.23 |
| Sappi Ltd | SAP | 4642 | 4584 | 1.27 | -15.45 | 5.02 |
| Santam Limited | SNT | 35636 | 36050 | -1.15 | 11.78 | 24.35 |
| The Spar Group Ltd | SPP | 12780 | 12615 | 1.31 | 2.13 | 8.40 |
| Sirius Real Estate Ltd | SRE | 2333 | 2305 | 1.21 | 4.85 | 5.33 |
| Tiger Brands Ltd | TBS | 23665 | 23732 | -0.28 | 7.57 | 17.57 |
| Transaction Capital Ltd | TCP | 282 | 285 | -1.05 | -1.05 | -64.66 |
| The Foschini Group Limited | TFG | 14580 | 14627 | -0.32 | 8.00 | 31.40 |
| Thungela Resources Ltd | TGA | 11868 | 12001 | -1.11 | -4.03 | -22.83 |
| Telkom SA SOC Ltd | TKG | 2782 | 2713 | 2.54 | 18.38 | -6.46 |
| Truworths Int Ltd | TRU | 9979 | 10032 | -0.53 | 12.00 | 34.22 |
| Woolworths Holdings Ltd | WHL | 6566 | 6559 | 0.11 | 14.51 | -9.06 |
| Zeda Limited | ZZD | 1300 | 1289 | 0.85 | 4.00 | 1.96 |

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

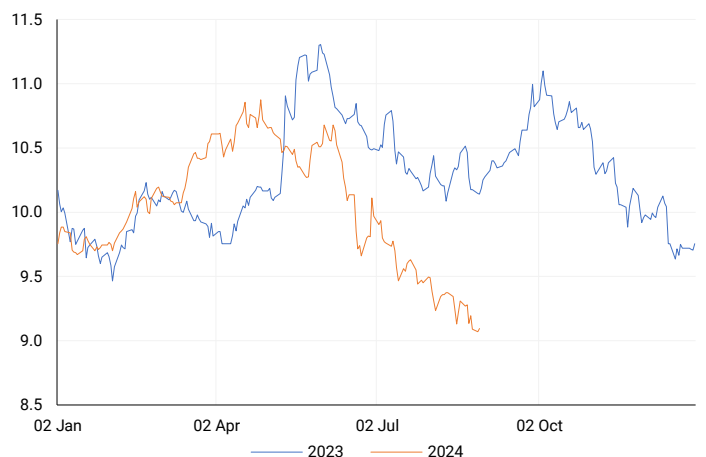
| COMPANY | CODE | CLOSE | PREVIOUS | 1D% | 1M% | YTD% |
|----------------------------|------|-------|----------|-------|--------|--------|
| ArcelorMittal SA Limited | ACL | 120 | 119 | 0.84 | -13.04 | -26.83 |
| ADVTECH Ltd | ADH | 3335 | 3330 | 0.15 | 10.76 | 35.90 |
| Altron Limited A | AEL | 1750 | 1755 | -0.28 | 6.06 | 70.73 |
| AECI Limited | AFE | 10820 | 10854 | -0.31 | 7.13 | -1.36 |
| Alexander Forbes Grp Hldgs | AFH | 678 | 682 | -0.59 | 4.95 | 2.73 |
| Afrimat Limited | AFT | 6787 | 6734 | 0.79 | 0.15 | 7.73 |
| African Rainbow Cap Inv | AIL | 620 | 618 | 0.32 | -2.97 | 26.79 |
| Adcock Ingram Hldgs Ltd | AIP | 6441 | 6707 | -3.97 | 8.16 | 7.17 |
| Astral Foods Ltd | ARL | 17400 | 17300 | 0.58 | 1.87 | 18.71 |
| Attacq Limited | ATT | 1157 | 1144 | 1.14 | 6.05 | 25.49 |
| Brait PLC | BAT | 109 | 114 | -4.39 | 37.97 | -40.11 |
| Blue Label Telecoms Ltd | BLU | 545 | 537 | 1.49 | 26.45 | 40.46 |
| Burststone Group | BTN | 826 | 809 | 2.10 | 5.90 | 3.25 |
| Coronation Fund Mngrs Ld | CML | 4044 | 4008 | 0.90 | 7.84 | 29.78 |
| Curro Holdings Limited | COH | 1315 | 1315 | 0.00 | 8.77 | 12.88 |
| Cashbuild Ltd | CSB | 16670 | 16625 | 0.27 | -1.50 | -0.14 |
| DRD Gold Ltd | DRD | 1530 | 1550 | -1.29 | -14.76 | -2.98 |
| Datatec Ltd | DTC | 3580 | 3580 | 0.00 | 1.16 | -11.60 |
| Emira Property Fund Ltd | EMI | 1097 | 1085 | 1.11 | 2.91 | 28.30 |
| Equites Prop Fund Ltd | EQU | 1385 | 1382 | 0.22 | 7.28 | -0.72 |
| Famous Brands Ltd | FBR | 5816 | 5712 | 1.82 | 6.29 | 0.40 |
| Fairvest Limited B | FTB | 437 | 440 | -0.68 | 10.63 | 27.03 |
| Grindrod Ltd | GND | 1466 | 1489 | -1.54 | -6.98 | 27.92 |
| Hosken Cons Inv Ltd | HCI | 18798 | 18908 | -0.58 | -1.58 | -7.22 |
| Hudaco Industries Ltd | HDC | 18641 | 18759 | -0.63 | 3.56 | 16.05 |
| Hyprop Inv Ltd | HYP | 3792 | 3755 | 0.99 | 21.66 | 21.89 |
| JSE Ltd | JSE | 11900 | 11523 | 3.27 | 12.37 | 28.73 |
| KAP Industrial Hldgs Ltd | KAP | 322 | 326 | -1.23 | 8.78 | 22.90 |
| Karooooo Ltd | KRO | 64660 | 65255 | -0.91 | 6.00 | 36.13 |
| PSG Konsult Limited | KST | 1700 | 1725 | -1.45 | -0.12 | 10.75 |
| Libstar Holdings Ltd | LBR | 410 | 422 | -2.84 | 7.61 | 17.14 |
| Lighthouse Properties plc | LTE | 822 | 824 | -0.24 | 2.62 | 11.84 |
| Industrials REIT Limited | MLI | 1.5 | 1.6 | -6.25 | 15.38 | 114.29 |
| MAS P.L.C | MSP | 1739 | 1730 | 0.52 | -2.36 | 0.46 |
| Metair Investments Ltd | MTA | 1498 | 1425 | 5.12 | 7.77 | -15.61 |
| Motus Holdings Ltd | MTH | 11750 | 11544 | 1.78 | 14.63 | 15.76 |
| Murray & Roberts Hldgs | MUR | 320 | 326 | -1.84 | 17.22 | 114.77 |
| Oceana Group Ltd | OCE | 7112 | 7050 | 0.88 | 3.07 | 0.64 |
| Omnia Holdings Ltd | OMN | 6335 | 6319 | 0.25 | -4.74 | -3.09 |
| Pan African Resource plc | PAN | 717 | 727 | -1.38 | 7.98 | 75.31 |
| PPC Limited | PPC | 410 | 410 | 0.00 | 7.05 | 2.76 |
| Raubex Group Ltd | RBX | 5000 | 4907 | 1.90 | 8.58 | 80.38 |
| RFG Holdings Limited | RFG | 1605 | 1629 | -1.47 | 4.90 | 18.89 |
| Reunert Ltd | RLO | 7700 | 7671 | 0.38 | 5.26 | 28.46 |
| SA Corp Real Estate Ltd | SAC | 276 | 274 | 0.73 | 1.10 | 18.97 |
| Super Group Ltd | SPG | 2670 | 2658 | 0.45 | -9.80 | -10.25 |
| Stor-Age Prop REIT Ltd | SSS | 1425 | 1405 | 1.42 | 6.74 | 9.11 |
| Southern Sun LTD | SSU | 640 | 640 | 0.00 | 10.15 | 21.90 |
| Sun International Ltd | SUI | 4126 | 4103 | 0.56 | 12.03 | 0.63 |
| Tharisa plc | THA | 1945 | 1974 | -1.47 | -0.26 | 28.72 |
| Tsogo Sun Gaming Ltd | TSG | 1171 | 1161 | 0.86 | 6.07 | -4.41 |
| Vukile Property Fund Ltd | VKE | 1785 | 1772 | 0.73 | 7.92 | 26.42 |
| Wilson Bayly Hlm-Ovc Ltd | WBO | 20000 | 20040 | -0.20 | 11.11 | 53.78 |

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

| REGION | YIELD | 1D | 1M | 1Y |
|-------------------|-------|----|-----|------|
| United States | 3.83% | 1 | -37 | -- |
| United Kingdom | 4.00% | 9 | -10 | -44 |
| Germany | 2.29% | 4 | -12 | -27 |
| Japan | 0.88% | 1 | -18 | -- |
| South African 10Y | 9.12% | 3 | -39 | -105 |

SOUTH AFRICAN 10-YEAR

2023 vs 2024 to date

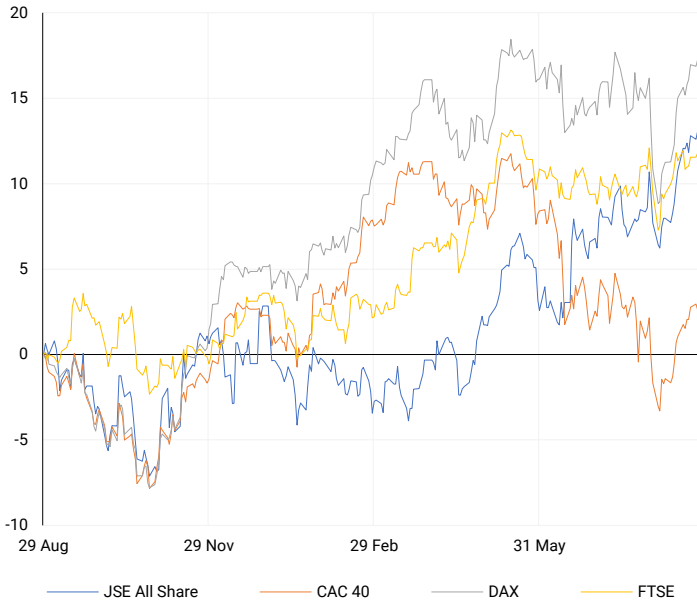


GLOBAL INTEREST RATES | SELECTED ITEMS

| 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% |

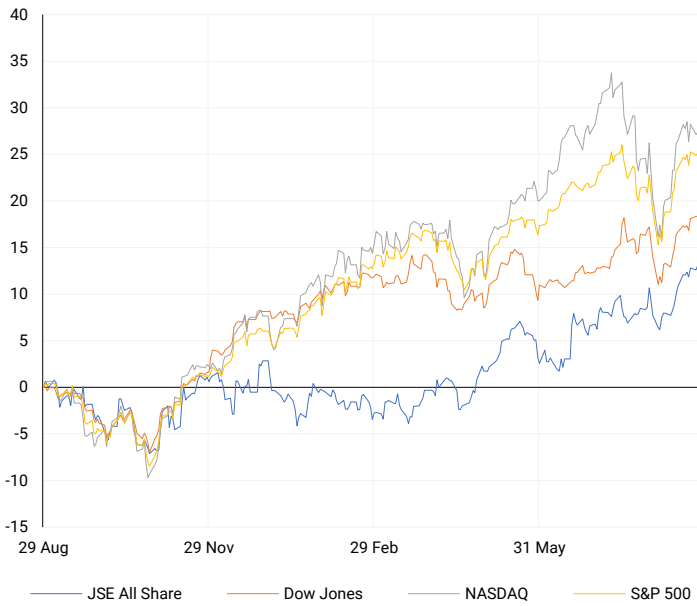
EUROPEAN INDICES

Normalised percentage performances



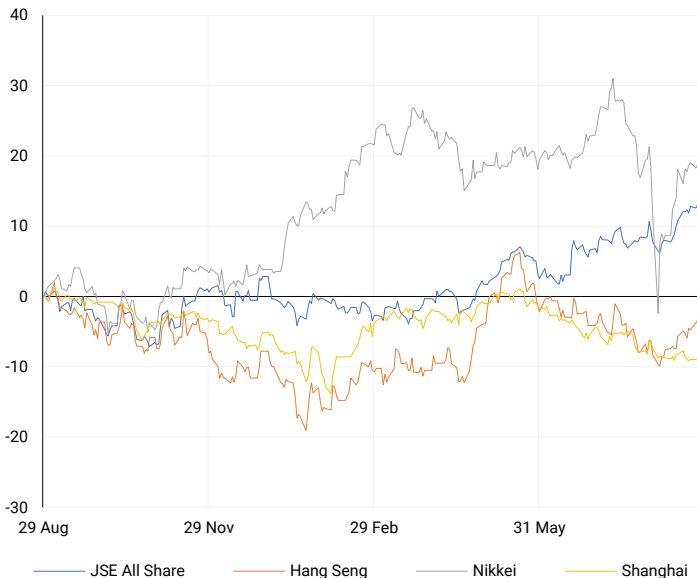
AMERICAN INDICES

Normalised percentage performances



ASIAN INDICES

Normalised percentage performances



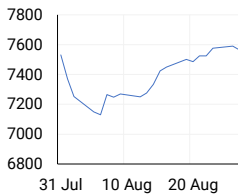
EUROPEAN MARKET SUMMARY

SELECTED ITEMS

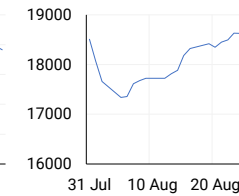
European markets closed slightly higher on Tuesday, with travel stocks leading the gains. Germany's second-quarter GDP fell by 0.1%, as confirmed by the country's statistics office, matching preliminary estimates. In the U.K., the British Retail Consortium reported that shop prices entered deflation in August for the first time in nearly three years, dropping by 0.3% from a previous 0.2% inflation. Meanwhile, Hungary's central bank announced it would keep interest rates unchanged at 6.75%, pausing its rate-cutting cycle.

| EUROPEAN INDICES | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
|------------------|----------|----------|-------|------|------|-------|
| CAC 40 | 7565.78 | 7590.37 | -0.32 | 1.07 | 0.64 | 0.30 |
| DAX 30 | 18681.81 | 18617.02 | 0.35 | 1.81 | 1.43 | 11.52 |
| Eurostoxx 50 | 4901.80 | 4897.00 | 0.10 | 0.88 | 0.85 | 8.41 |
| FTSE | 8345.46 | 8327.78 | 0.21 | 0.87 | 0.72 | 7.92 |

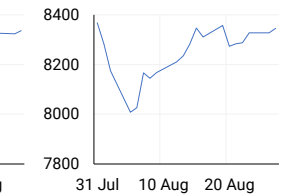
CAC 40



DAX



FTSE



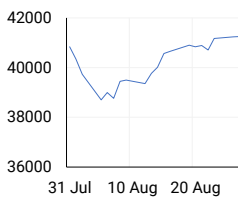
AMERICAN MARKET SUMMARY

SELECTED ITEMS

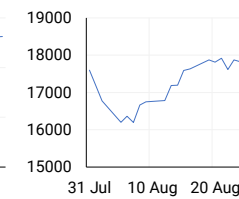
The S&P 500 closed higher on Tuesday, and the Dow Jones reached a record-high close, as investors anticipated Nvidia's quarterly report today and upcoming economic data that could provide insights into future interest rate cuts. U.S. consumer confidence hit a six-month high in August, though concerns about the labour market grew after the unemployment rate rose to 4.3%, the highest in nearly three years. Investors are also awaiting the July Personal Consumption Expenditure data, due on Friday, for further clues on the pace of potential rate cuts.

| AMERICAN INDICES | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
|------------------|----------|----------|-------|-------|-------|-------|
| Dow Jones | 41250.50 | 41240.52 | 0.02 | 1.02 | 1.63 | 9.45 |
| Nasdaq | 17754.82 | 17725.77 | 0.16 | -0.35 | 2.29 | 18.28 |
| S&P 500 | 5625.80 | 5616.84 | 0.16 | 0.51 | 3.05 | 17.95 |
| US VIX | 15.43 | 16.15 | -4.46 | -2.83 | -5.86 | 23.94 |

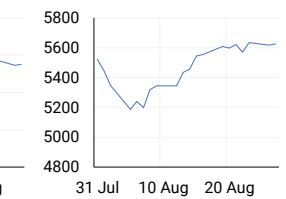
DOW JONES



NASDAQ



S&P 500



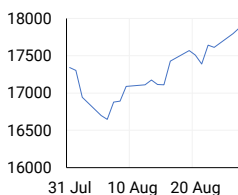
ASIAN MARKET SUMMARY

SELECTED ITEMS

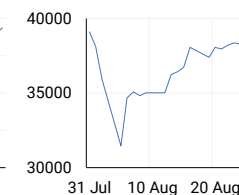
Asia-Pacific markets declined this morning as investors reacted to Australia's higher-than-expected July inflation numbers. The Consumer Price Index (CPI) rose 3.5% year-on-year, slightly above the 3.4% forecast by economists and down from 3.8% in June. This is the lowest CPI figure since March. Meanwhile, minutes from the Reserve Bank of Australia's latest meeting revealed that the central bank had considered raising interest rates in its ongoing efforts to control inflation.

| ASIAN INDICES | CLOSE | PREVIOUS | 1D% | 5D% | 1M% | YTD% |
|---------------|----------|----------|-------|-------|-------|-------|
| Hang Seng | 17874.67 | 17798.73 | 0.43 | 2.08 | 5.01 | 4.85 |
| Nikkei 225 | 38288.62 | 38110.22 | 0.47 | 0.59 | 1.65 | 14.42 |
| Shanghai | 2848.73 | 2855.52 | -0.24 | -0.63 | -1.46 | -4.24 |

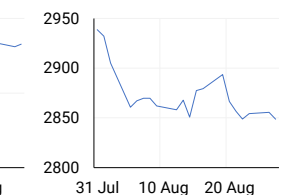
HANG SENG



NIKKEI



SHANGHAI



COMMODITIES MARKET SUMMARY

SELECTED ITEMS

Gold prices rose on Tuesday, supported by a weaker dollar, as investors awaited upcoming inflation data that could influence the size of an expected interest rate cut by the Federal Reserve next month. Meanwhile, oil prices rebounded this morning after a sharp decline the previous day, which had interrupted a three-day rally. The market has been volatile, with investors weighing concerns over potential supply disruptions in Libya and the Middle East against worries about global fuel demand.

| COMMODITY | LAST | CLOSE | % CHG | 1D% | 5D% | YTD% |
|-------------|---------|---------|-------|-------|------|--------|
| Brent Crude | 79.61 | 79.79 | -0.23 | -1.77 | 3.40 | 3.52 |
| Gold | 2512.72 | 2524.59 | -0.47 | 0.26 | 0.42 | 22.37 |
| Palladium | 970.38 | 975.01 | -0.47 | 1.22 | 4.84 | -11.14 |
| Platinum | 956.14 | 962.55 | -0.67 | -0.06 | 1.06 | -2.50 |
| Silver | 29.84 | 29.98 | -0.47 | 0.23 | 1.87 | 26.03 |

BRENT CRUDE

One-year



PLATINUM

One-year



GOLD

One-year



| CURRENCY PAIR | LAST | CLOSE | % CHG | 1D% | 5D% | YTD% |
|---------------|--------|--------|-------|-------|-------|-------|
| USDZAR | 17.75 | 17.74 | 0.04 | 0.08 | -0.39 | -3.19 |
| GBPZAR | 23.50 | 23.50 | 0.01 | 0.47 | 1.20 | 0.88 |
| EURZAR | 19.81 | 19.83 | -0.10 | 0.20 | 0.00 | -1.76 |
| AUDZAR | 12.06 | 12.04 | 0.20 | 0.23 | 0.18 | -3.38 |
| EURUSD | 1.12 | 1.12 | -0.17 | 0.20 | 0.49 | 1.33 |
| USDJPY | 144.50 | 143.96 | 0.37 | -0.39 | -0.89 | 2.07 |
| GBPUSD | 1.32 | 1.33 | -0.12 | 0.55 | 1.73 | 4.15 |
| USDCHF | 0.84 | 0.84 | 0.21 | -0.64 | -1.44 | 0.03 |

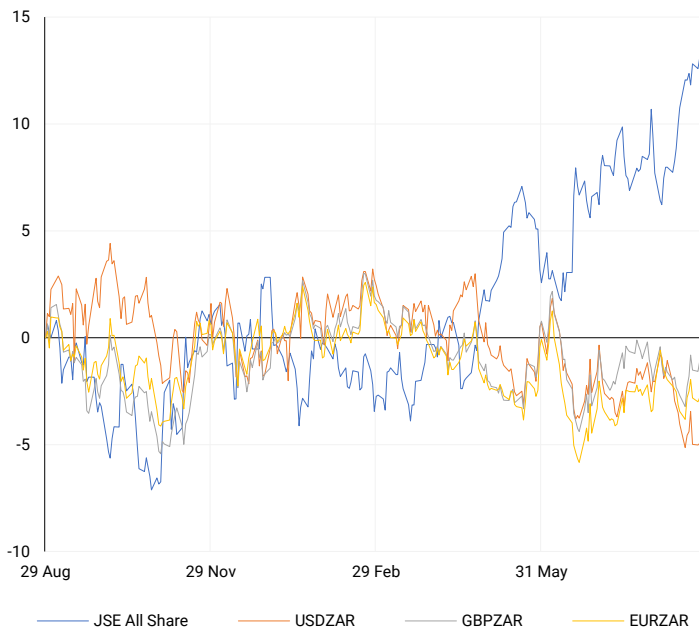
CURRENCY MARKET SUMMARY

SELECTED ITEMS

The South African rand remained stable on Tuesday as investors awaited key local data releases later in the week. Meanwhile, the U.S. dollar hovered near its lowest level in over a year against a basket of currencies this morning, with the British pound trading close to multi-year highs. Market participants are focused on upcoming indicators that could provide insights into the size of the anticipated U.S. interest rate cut next month.

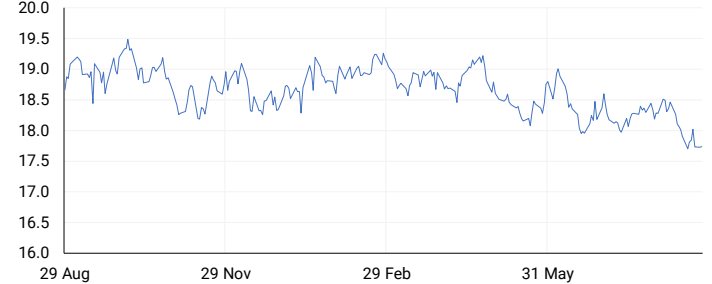
CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



USDZAR

One-year



EURUSD

One-year



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

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