

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	81668.40	80827.79	1.04	-0.58	1.37	6.21
Top 40	74089.60	73223.30	1.18	-0.85	0.60	5.10
Financial 15	20777.70	20584.77	0.94	0.66	7.72	16.25
Industrial 25	111067.00	111018.18	0.04	-1.31	0.96	7.09
Resource 10	53079.50	51008.73	4.06	-1.39	-8.14	-7.74
Mid Cap	85686.70	84257.52	1.70	0.82	1.72	6.56
Small Cap	85417.40	85586.16	-0.20	0.14	7.28	17.83
Banks	13064.30	12959.52	0.81	0.39	7.27	19.33
Retailers	7223.79	7165.02	0.82	1.00	8.49	15.89
Property (J253) - TR	2392.66	2392.66	0.00	2.87	11.07	28.38

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	41096.77	40861.71	0.58	0.84	4.42	9.04
Nasdaq	17569.68	17395.53	1.00	2.58	4.70	17.04
S&P 500	5595.76	5554.13	0.75	1.68	4.70	17.32
US VIX	17.07	17.69	-3.50	-14.22	-17.58	37.11

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7435.07	7396.83	0.52	0.04	2.54	-1.43
DAX 30	18518.39	18330.27	1.03	-0.31	4.47	10.55
Eurostoxx 50	4809.00	4766.90	0.88	-0.34	2.84	6.35
FTSE	8240.97	8193.94	0.57	-0.01	0.37	6.57

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17240.39	17108.71	0.77	-1.17	0.75	1.13
Nikkei 225	36833.27	35619.77	3.41	0.48	5.16	10.07
Shanghai	2717.12	2721.80	-0.17	-2.55	-4.94	-8.67

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	374.60	372.60	0.54	0.65	-0.21	28.39
BHP AUS	3935.00	3881.00	1.39	1.46	3.30	-18.81

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	Michigan Consumer Sentiment Prel	Sep	67.40	67.90
16:00	US	Michigan Inflation Expectations Prel	Sep	2.80%	2.80%
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TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
10:30	ZA	Inflation Expectations	Q3	4.80%	4.80%
11:30	ZA	Gold Production y/y	Jul	-10.00%	-3.50%
11:30	ZA	Mining Production y/y	Jul	1.10%	-1.40%
14:30	US	PPI m/m	Aug	0.10%	0.20%
14:45	EA	ECB Press Conference	---	---	---

JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Sibanye Stillwater Ltd	SSW	1549	9.86	-3.79	-37.79	
Harmony GM Co Ltd	HAR	16867	9.33	5.48	41.04	
African Rainbow Min Ltd	ARI	16388	6.78	1.16	-18.06	
Impala Platinum Hlgs Ltd	IMP	7732	6.30	2.07	-15.28	
DRD Gold Ltd	DRD	1443	5.79	0.00	-8.50	
Anglo American Plat Ltd	AMS	53478	5.49	-10.70	-44.52	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Super Group Ltd	SPG	2418	-6.28	-12.33	-18.72	
Transaction Capital Ltd	TCP	243	-4.33	-7.25	-69.55	
Emira Property Fund Ltd	EMI	1067	-3.53	1.62	24.80	
Growthpoint Prop Ltd	GRT	1387	-2.53	-1.35	18.75	
Pick n Pay Stores Ltd	PIK	2281	-2.35	-3.06	-1.98	

DIVIDEND DATA

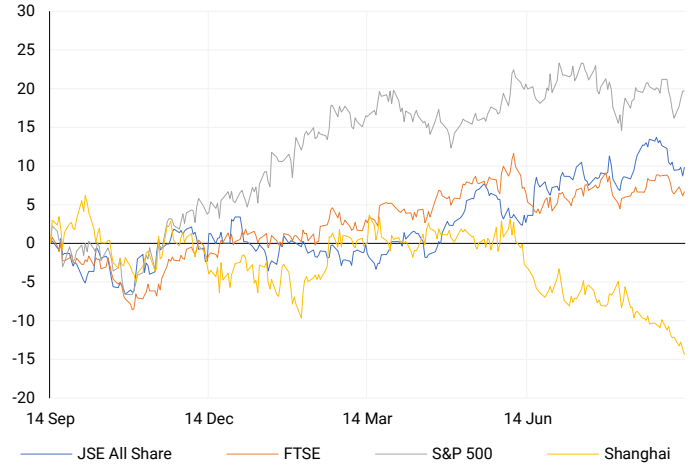
COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
Adcock Ingram Holdings	AIP	150 ZARc	Northam Platinum	NPH	70 ZARc
Aspen Pharmacare	APN	359 ZARc	PPC	PPC	33.5 ZARc
Compagnie Fin. Richemont SA	CFR	275 CHF	Santam	SNT	535 ZARc
Grindrod	GND	23 ZARc	South32	S32	3.1 USDc
NEPI Rockcastle NV	NRP	27.11 EURc	Thungela Resources	TGA	200 ZARc

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

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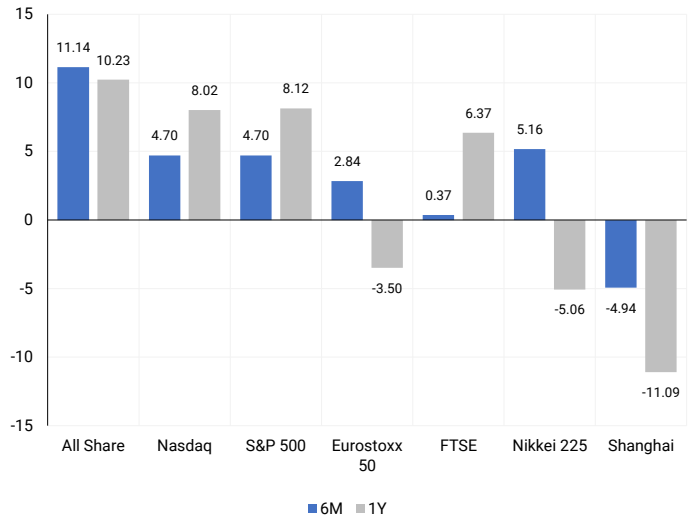
INTERNATIONAL INDICES

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, 17 September

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

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	16675	16474	1.22	-3.52	10.86	1.86
Anglo American plc	47971	46859	2.37	-2.96	-8.10	1.31
Anglo American Plat Ltd	53478	50695	5.49	-10.70	-14.13	-44.52
Anglogold Ashanti Ltd	49924	48257	3.45	-3.33	-6.46	41.26
Anheuser-Busch InBev SA NV	115518	115506	0.01	2.17	5.14	-3.75
BHP Group Limited	46207	44970	2.75	-0.94	-5.02	-27.05
BID Corporation Ltd	44296	44580	-0.64	-2.44	3.32	3.82
British American Tob plc	69100	69415	-0.45	1.72	5.82	27.61
Compagnie Fin Richemont	250000	250406	-0.16	-3.28	-6.90	-2.63
Capitec Bank Hldgs Ltd	301500	300595	0.30	3.71	10.21	48.79
Discovery Ltd	15508	14846	4.46	3.02	10.77	7.93
Firststrand Ltd	8620	8562	0.68	1.32	8.36	17.26
Gold Fields Ltd	24450	23500	4.04	0.20	-10.54	-11.98
Glencore plc	8679	8461	2.58	-2.48	-9.07	-22.27
Impala Platinum Hlgs Ltd	7732	7274	6.30	2.07	-5.85	-15.28
Kumba Iron Ore Ltd	34361	33260	3.31	6.77	-11.83	-44.11
Mondi plc	32994	32897	0.29	-2.09	-0.81	-9.11
MTN Group Ltd	9275	9200	0.82	1.89	11.88	-19.70
Naspers Ltd -N-	351300	352286	-0.28	-3.53	-4.95	12.31
Prosus N.V.	63359	63795	-0.68	-4.06	-3.78	13.06
South32 Limited	3676	3529	4.17	2.65	5.18	-12.87
Standard Bank Group Ltd	22919	22790	0.57	-2.44	6.03	10.13
Shoprite Holdings Ltd	29883	29677	0.69	-1.18	3.09	8.65
Sanlam Limited	8673	8461	2.51	1.51	9.85	19.13
Sasol Limited	11970	11670	2.57	-7.46	-6.85	-35.40
Sibanye Stillwater Ltd	1549	1410	9.86	-3.79	-12.49	-37.79
Vodacom Group Ltd	11064	11030	0.31	-0.41	13.28	4.38

## SOUTH AFRICAN MARKET SUMMARY

### SELECTED ITEMS

On the Johannesburg Stock Exchange, the Top-40 index rose over 1.1%. All eyes are on the August consumer inflation figures due on Sept. 18, after July's 4.6% figure neared the Reserve Bank's target of 4.5%. Economists expect a 25-basis point rate cut on Sept. 19, which would be the first in over four years. Discovery's shares surged more than 4% after announcing an expected double-digit profit increase, while Lesaka Technologies reported an 11% revenue rise to R10.6 billion. Sibanye Stillwater plans to cut palladium and platinum output by up to 45% at its Montana mines to restore profitability.

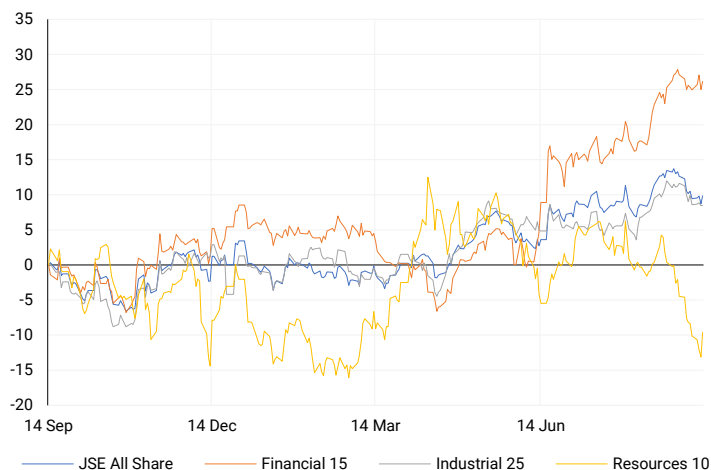
### JSE ALL SHARE

One-year



### LOCAL INDICES

Normalised percentage performances



### EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
Metair	MTA	Interim	13 Sep '24
SA Corp	SAC	Interim	15 Sep '24
Universal Partners	UPL	Final	16 Sep '24
Oursurance	OUT	Final	17 Sep '24
Clientele	CLI	Final	18 Sep '24

### BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	8850	11.24	Thu, 06 Jun '24
Standard Bank	SBPP	8780	11.15	Thu, 05 Sep '24
Absa	ABSP	81450	11.48	Thu, 12 Sep '24
Capitec	CPIP	10485	9.69	Thu, 19 Sep '24
Steinhoff	SHFF	9734	10.47	Thu, 17 Oct '24
Grindrod	GNDP	9221	12.22	Thu, 19 Sep '24
Netcare	NTCP	8102	11.82	Thu, 31 Oct '24
Discovery	DSBP	9699	11.91	Thu, 19 Sep '24
Invicta	IVTP	---	13.41	Thu, 27 Jun '24

### LOCAL SENS ANNOUNCEMENTS

#### SELECTED RELEASE

##### DISCOVERY LIMITED – Voluntary Trading Statement

Discovery expects strong performance for the year ending 30 June 2024, with new business growing by 18%. The company also anticipates a 15% to 20% increase in normalized profit from operations, while normalized headline earnings are expected to rise between 12% and 17%. Additionally, headline earnings are forecasted to increase by 4% to 9%.

DSY | 4.46% OPEN | 14874c HIGH | 15590c LOW | 14873c CLOSE | 15508c TIME | 09:09

##### TRUWORTHS INTERNATIONAL LIMITED – Summarised Group Annual Results

For the 52 weeks ending 30 June 2024, the sale of merchandise increased by 3.9% to R20.7 billion, while retail sales rose by 3.6% to R21.4 billion. The gross profit margin slightly decreased to 52.3% from 52.5% in 2023. Operating margins were 27.3% (down from 24.0% in 2023) and 22.0% on a pro forma basis (similar to 22.2% in 2023). Earnings per share increased by 17.8%, but headline earnings per share dropped by 6.3% (up 1.0% on a pro forma basis). Cash generated from operations grew to R4.7 billion from R3.8 billion, while net debt decreased to R306 million from R850 million in 2023. However, the annual dividend per share fell by 6.4% to 529 cents.

TRU | 1.54% OPEN | 9400c HIGH | 9674c LOW | 9039c CLOSE | 9548c TIME | 14:37

##### FIRSTSTRAND LIMITED – Audited Results

For the year ended 30 June 2024, basic and diluted normalized earnings per share rose by 4% to 677.2 cents, while normalized earnings increased to R37.988 million, also up 4%. Headline earnings and normalized net asset value both grew by 4% and 8%, respectively, with normalized net asset value per share reaching 3 488.1 cents. The ordinary dividend per share rose by 8% to 415 cents. However, return on equity (ROE) slightly declined to 20.1% from 21.1%. Advances net of credit impairment increased by 5% to R1.611 billion, and deposits grew by 4% to R2.003 billion, while the credit loss ratio edged up to 0.81%.

FSR | 0.68% OPEN | 8789c HIGH | 8922c LOW | 8540c CLOSE | 8620c TIME | 08:30

##### UNIVERSAL PARTNERS LIMITED – Summarised Audited Financial Statements

For the year ended 30 June 2024, the net asset value per share (NAV) slightly decreased to GBP 1.292 from GBP 1.296 in 2023. The company reported a loss for the year of GBP 278 836, an improvement from the larger loss of GBP 3 062 172 in 2023. The loss per share and headline loss per share both improved, dropping to 0.383 pence from 4.21 pence the previous year.

UPL | 0.00% OPEN | 2000c HIGH | 2000c LOW | 2000c CLOSE | 2000c TIME | 08:00

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmaceare Hldgs Ltd	APN	19211	19155	0.29	-16.11	-5.60
African Rainbow Min Ltd	ARI	16388	15347	6.78	-16.12	-18.06
AVI Ltd	AVI	10516	10466	0.48	9.46	28.13
Barloworld Ltd	BAW	9273	9342	-0.74	0.21	17.38
Bidvest Ltd	BVT	27742	27778	-0.13	5.39	9.96
Bytes Technology Grp PLC	BYI	10520	10332	1.82	-2.93	-26.54
Capital&Counties Prop plc	CCO	3498	3516	-0.51	4.39	7.63
Clicks Group Ltd	CLS	37903	37533	0.99	6.90	16.37
Dis-Chem Pharmacies Ltd	DCP	3554	3540	0.40	-0.81	15.80
Exxaro Resources Ltd	EXX	15384	15200	1.21	-17.42	-24.77
Fortress Real Est INV B	FFB	1990	2012	-1.09	15.03	38.58
Growthpoint Prop Ltd	GRT	1387	1423	-2.53	7.52	18.75
Harmony GM Co Ltd	HAR	16867	15427	9.33	-3.56	41.04
Hammerson plc	HMN	690	688	0.29	6.32	1.47
Investec Ltd	INL	13632	13349	2.12	1.27	8.54
Investec plc	INP	13586	13310	2.07	0.64	7.87
Italtile Ltd	ITE	1173	1177	-0.34	4.17	4.73
Life Healthc Grp Hldgs Ltd	LHC	1435	1437	-0.14	12.64	-21.88
MultiChoice Group Ltd	MCG	10801	10876	-0.69	0.04	33.31
Montauk Renewables Inc	MKR	8100	8000	1.25	-11.96	-52.91
Mr Price Group Ltd	MRP	23837	23739	0.41	9.35	52.01
Momentum Met Hldgs Ltd	MTM	2799	2759	1.45	7.36	27.87
Ninety One Plc	N91	3771	3700	1.92	-0.48	-12.55
Nedbank Group Ltd	NED	28733	28299	1.53	2.15	32.88
Northam Platinum Hldgs Ltd	NPH	9437	8997	4.89	-24.55	-32.80
NEPI Rockcastle N.V.	NRP	14800	14846	-0.31	6.92	17.11
Netcare Limited	NTC	1359	1351	0.59	8.03	-4.56
Ninety One Limited	NY1	3805	3760	1.20	1.68	-11.45
Old Mutual Limited	OMU	1256	1241	1.21	6.98	-3.83
OUTsurance Group Ltd	OUT	5030	5045	-0.30	6.70	19.19
Pick n Pay Stores Ltd	PIK	2281	2336	-2.35	-0.13	-1.98
Pepkor Holdings Ltd	PPH	2189	2130	2.77	10.89	11.51
Quilter Plc	QLT	3086	3079	0.23	-5.91	27.10
Redefine Properties Ltd	RDF	495	499	-0.80	14.85	28.57
Remgro Ltd	REM	14550	14418	0.92	10.12	-10.45
Resilient REIT Limited	RES	5873	5915	-0.71	14.60	32.60
Reinet Investments S.C.A	RNI	48759	48083	1.41	5.07	4.59
Sappi Ltd	SAP	4625	4655	-0.64	1.89	4.64
Santam Limited	SNT	35500	35553	-0.15	10.49	23.88
The Spar Group Ltd	SPP	12172	12320	-1.20	0.03	3.24
Sirius Real Estate Ltd	SRE	2329	2312	0.74	4.91	5.15
Tiger Brands Ltd	TBS	24114	23827	1.20	11.09	19.80
Transaction Capital Ltd	TCP	243	254	-4.33	-12.27	-69.55
The Foschini Group Limited	TFG	13703	13863	-1.15	5.44	23.49
Thungela Resources Ltd	TGA	10450	10446	0.04	-17.08	-32.05
Telkom SA SOC Ltd	TKG	2730	2723	0.26	17.12	-8.20
Truworths Int Ltd	TRU	9548	9403	1.54	7.78	28.42
Woolworths Holdings Ltd	WHL	6300	6255	0.72	5.99	-12.74
Zeda Limited	ZZD	1320	1305	1.15	10.00	3.53

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

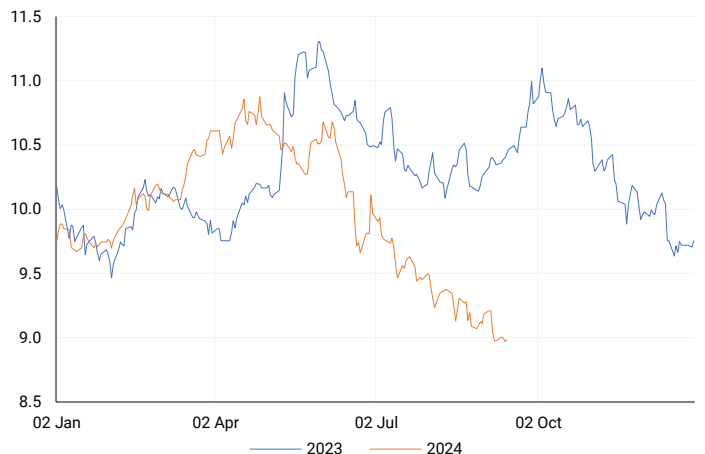
COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	119	120	-0.83	-7.03	-27.44
ADVTECH Ltd	ADH	3076	3117	-1.32	4.80	25.35
Altron Limited A	AEL	1675	1700	-1.47	5.81	63.41
AECI Limited	AFE	10367	10358	0.09	1.09	-5.49
Alexander Forbes Grp Hldgs	AFH	691	682	1.32	5.50	4.70
Afrimat Limited	AFT	6611	6465	2.26	4.09	4.94
African Rainbow Cap Inv	AIL	685	676	1.33	10.48	40.08
Adcock Ingram Hldgs Ltd	AIP	6500	6556	-0.85	14.04	8.15
Astral Foods Ltd	ARL	17800	17700	0.56	5.88	21.44
Attacq Limited	ATT	1293	1307	-1.07	18.73	40.24
Brait PLC	BAT	112	111	0.90	33.33	-38.46
Blue Label Telecoms Ltd	BLU	475	480	-1.04	11.50	22.42
Burstone Group	BTN	912	919	-0.76	18.29	14.00
Coronation Fund Mngrs Ld	CML	3655	3648	0.19	0.11	17.30
Curro Holdings Limited	COH	1295	1283	0.94	10.12	11.16
Cashbuild Ltd	CSB	15801	15800	0.01	11.35	-5.34
DRD Gold Ltd	DRD	1443	1364	5.79	-12.23	-8.50
Datatec Ltd	DTC	3584	3557	0.76	2.61	-11.51
Emira Property Fund Ltd	EMI	1067	1106	-3.53	-0.56	24.80
Equites Prop Fund Ltd	EQU	1415	1426	-0.77	8.51	1.43
Famous Brands Ltd	FBR	5625	5699	-1.30	0.81	-2.90
Fairvest Limited B	FTB	444	444	0.00	9.36	29.07
Grindrod Ltd	GND	1471	1481	-0.68	-4.23	28.36
Hosken Cons Inv Ltd	HCI	18194	18241	-0.26	0.52	-10.20
Hudaco Industries Ltd	HDC	18300	18600	-1.61	-0.54	13.93
Hyprop Inv Ltd	HYP	4097	4090	0.17	23.22	31.69
JSE Ltd	JSE	11915	11900	0.13	13.12	28.89
KAP Industrial Hldgs Ltd	KAP	333	327	1.83	14.83	27.10
Karooooo Ltd	KRO	67900	68890	-1.44	7.25	42.95
PSG Konsult Limited	KST	1760	1777	-0.96	7.98	14.66
Libstar Holdings Ltd	LBR	400	410	-2.44	-2.44	14.29
Lighthouse Properties plc	LTE	801	809	-0.99	-2.32	8.98
Industrials REIT Limited	MLI	1.9	2	-5.00	11.76	171.43
MAS P.L.C	MSP	1735	1750	-0.86	0.23	0.23
Metair Investments Ltd	MTA	1519	1501	1.20	15.95	-14.42
Motus Holdings Ltd	MTH	11595	11500	0.83	11.89	14.24
Murray & Roberts Hldgs	MUR	280	265	5.66	-8.20	87.92
Oceana Group Ltd	OCE	6632	6666	-0.51	-6.00	-6.16
Omnia Holdings Ltd	OMN	6263	6258	0.08	-2.70	-4.19
Pan African Resource plc	PAN	713	690	3.33	10.71	74.33
PPC Limited	PPC	395	395	0.00	-0.75	-1.00
Raubex Group Ltd	RBX	5100	5047	1.05	27.95	83.98
RFG Holdings Limited	RFG	1559	1617	-3.59	2.84	15.48
Reunert Ltd	RLO	7474	7479	-0.07	3.81	24.69
SA Corp Real Estate Ltd	SAC	295	298	-1.01	11.32	27.16
Super Group Ltd	SPG	2418	2580	-6.28	-4.77	-18.72
Stor-Age Prop REIT Ltd	SSS	1485	1482	0.20	10.74	13.71
Southern Sun LTD	SSU	680	664	2.41	8.28	29.52
Sun International Ltd	SUI	4530	4438	2.07	16.15	10.49
Tharisa plc	THA	1730	1701	1.70	-8.95	14.49
Tsogo Sun Gaming Ltd	TSG	1192	1192	0.00	6.43	-2.69
Vukile Property Fund Ltd	VKE	1794	1790	0.22	7.88	27.05
Wilson Bayly Hlm-Ovc Ltd	WBO	20372	20307	0.32	11.10	56.64

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

REGION	YIELD	1D	1M	1Y
United States	3.65%	-1	-25	--
United Kingdom	3.78%	2	-13	-63
Germany	2.15%	4	-7	-49
Japan	0.83%	-1	0	--
South African 10Y	9.00%	0	-27	-141

**SOUTH AFRICAN 10-YEAR**

2023 vs 2024 to date

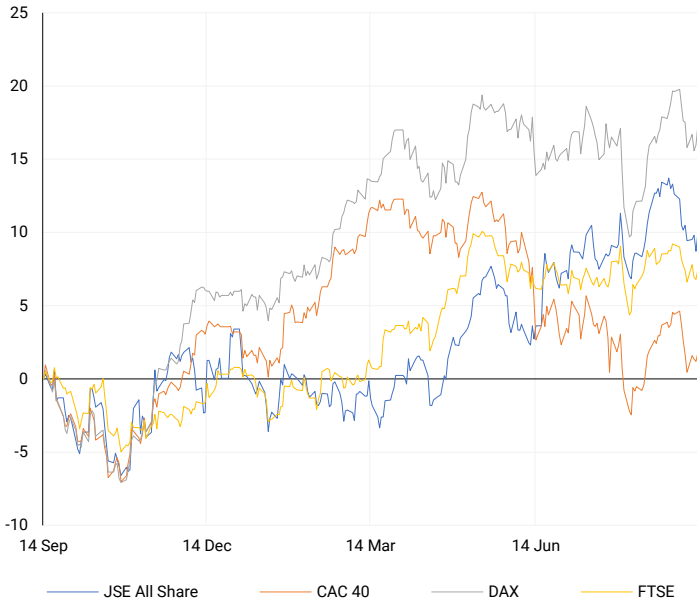


**GLOBAL INTEREST RATES | SELECTED ITEMS**

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%

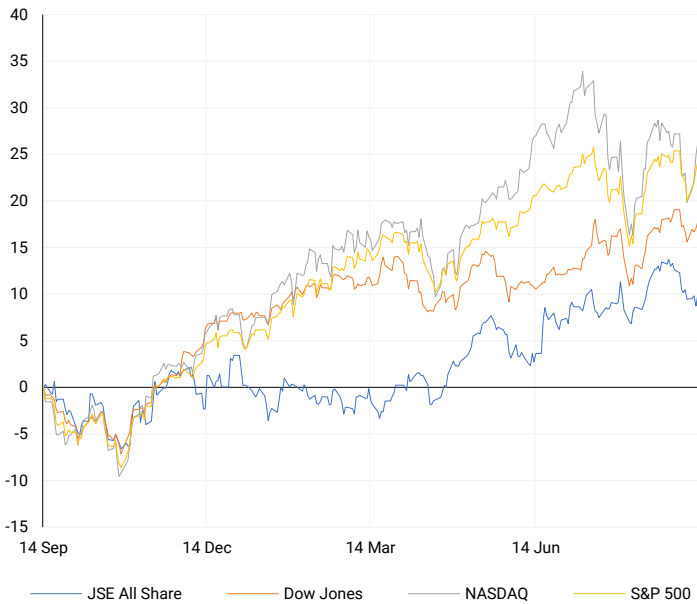
## EUROPEAN INDICES

Normalised percentage performances



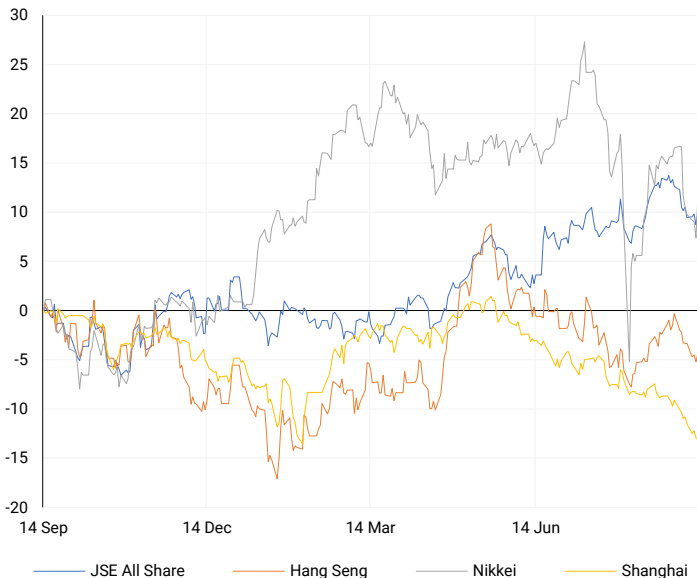
## AMERICAN INDICES

Normalised percentage performances



## ASIAN INDICES

Normalised percentage performances



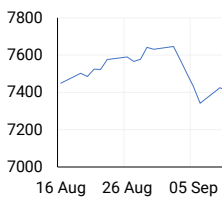
## EUROPEAN MARKET SUMMARY

### SELECTED ITEMS

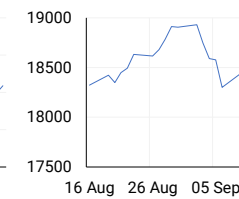
European shares surged on Thursday after the European Central Bank (ECB) cut interest rates by 25 basis points, bringing the key rate to 3.5%. This marks the ECB's second rate cut this year as inflation remains near its 2% target, while the eurozone economy teeters on the edge of recession. The ECB, however, did not commit to any future rate changes. In Spain, 12-month EU-harmonised inflation eased to 2.4% in August, while Swedish inflation also dipped by 0.5%, slightly below forecasts.

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7435.07	7396.83	0.52	0.04	2.54	-1.43
DAX 30	18518.39	18330.27	1.03	-0.31	4.47	10.55
Eurostoxx 50	4809.00	4766.90	0.88	-0.34	2.84	6.35
FTSE	8240.97	8193.94	0.57	-0.01	0.37	6.57

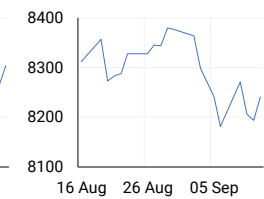
### CAC 40



### DAX



### FTSE



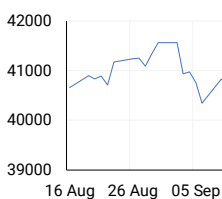
## AMERICAN MARKET SUMMARY

### SELECTED ITEMS

Wall Street's major indexes closed higher on Thursday as inflation data supported expectations of a 25-basis point rate cut by the Federal Reserve. The producer price index (PPI) rose 0.2% in August, slightly above the 0.1% forecast, while core PPI, excluding food and energy, increased by 0.3%, also exceeding expectations. Initial jobless claims matched estimates at 230,000 for the week ending Sept. 7. Recent weaker employment and economic data had sparked speculation of a 50-basis point rate cut, but those hopes diminished following the latest inflation report.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	41096.77	40861.71	0.58	0.84	4.42	9.04
Nasdaq	17569.68	17395.53	1.00	2.58	4.70	17.04
S&P 500	5595.76	5554.13	0.75	1.68	4.70	17.32
US VIX	17.07	17.69	-3.50	-14.22	-17.58	37.11

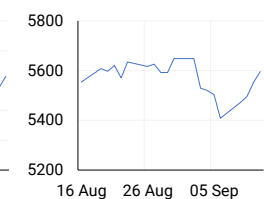
### DOW JONES



### NASDAQ



### S&P 500



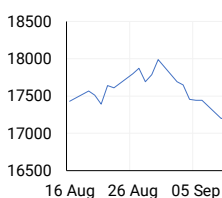
## ASIAN MARKET SUMMARY

### SELECTED ITEMS

Asia-Pacific markets were mixed this morning, with mainland Chinese markets rebounding from a six-year low, while Australian markets hovered near an all-time high. Investors in Asia focused on India's August inflation data, which showed a 3.65% year-on-year rise in the consumer price index, up from July's revised 3.6% and above the 3.5% forecast. Additionally, the calendar included a speech by the Bank of Thailand's governor and an address by a Bank of Japan board member.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	17240.39	17108.71	0.77	-1.17	0.75	1.13
Nikkei 225	36833.27	35619.77	3.41	0.48	5.16	10.07
Shanghai	2717.12	2721.80	-0.17	-2.55	-4.94	-8.67

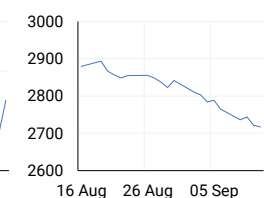
### HANG SENG



### NIKKEI



### SHANGHAI



## COMMODITIES MARKET SUMMARY

### SELECTED ITEMS

Gold prices surged over 1% on Thursday, reaching a record high due to growing expectations of a Federal Reserve interest rate cut next week, following U.S. economic data that indicated a slowdown. Meanwhile, oil prices continued to rise this morning, fuelled by supply concerns as Hurricane Francine caused output disruptions in the U.S. Gulf of Mexico, prompting evacuations of production platforms before the storm hit Louisiana.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	72.25	72.17	0.11	2.08	-0.88	-6.37
Gold	2567.81	2558.80	0.35	1.88	1.67	24.03
Palladium	1049.40	1051.03	-0.16	3.05	11.43	-4.21
Platinum	988.65	982.95	0.58	2.78	5.74	-0.44
Silver	29.94	29.87	0.23	4.11	3.64	25.57

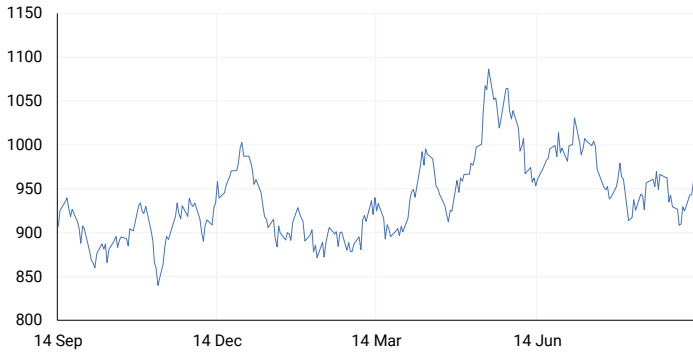
## BRENT CRUDE

One-year



## PLATINUM

One-year



## GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	17.73	17.78	-0.24	-0.70	0.37	-2.99
GBPZAR	23.32	23.34	-0.07	-0.06	-0.02	0.17
EURZAR	19.66	19.69	-0.16	-0.12	0.07	-2.47
AUDZAR	11.93	11.95	-0.19	0.06	0.14	-4.04
EURUSD	1.11	1.11	0.12	0.57	-0.33	0.33
USDJPY	140.95	141.82	-0.62	-0.38	-1.13	0.56
GBPUSD	1.31	1.31	0.19	0.62	-0.42	3.08
USDCHF	0.85	0.85	-0.21	-0.14	0.83	1.13

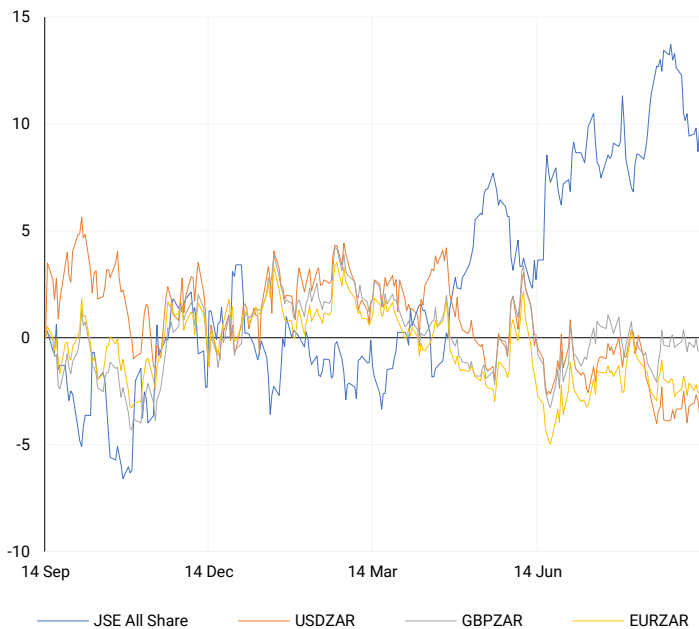
## CURRENCY MARKET SUMMARY

### SELECTED ITEMS

South Africa's rand edged higher on Thursday, benefiting from a weaker dollar, as investors await key local events next week, including inflation data and an interest rate decision. This morning, the dollar fell against the yen, as expectations grew for a larger-than-expected Federal Reserve interest rate cut next week, following reports that officials were facing a challenging decision.

## 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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