

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	86548.42	87579.71	-1.18	2.09	3.34	12.56
Top 40	78506.28	79510.60	-1.26	2.28	2.90	11.36
Financial 15	21233.65	21545.32	-1.45	-1.04	1.44	18.80
Industrial 25	119804.93	120741.06	-0.78	5.05	4.80	15.51
Resource 10	57845.10	59021.57	-1.99	1.48	3.12	0.54
Mid Cap	91707.00	92528.32	-0.89	0.32	4.52	14.04
Small Cap	88673.96	89408.77	-0.82	0.72	3.55	22.32
Banks	13194.16	13430.26	-1.76	-1.82	-0.27	20.51
Retailers	7996.67	8030.16	-0.42	1.05	8.15	28.28
Property (J253) - TR	2423.61	2439.31	-0.64	-0.60	5.04	30.04

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	42330.15	42313.00	0.04	0.49	1.85	12.31
Nasdaq	18189.17	18119.59	0.38	1.20	2.68	21.17
S&P 500	5762.48	5738.17	0.42	0.77	2.02	20.81
US VIX	16.73	16.96	-1.36	5.29	11.53	34.38

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7634.82	7791.79	-2.01	1.69	0.05	1.21
DAX 30	19324.93	19473.63	-0.76	2.54	2.21	15.36
Eurostoxx 50	5009.10	5068.55	-1.17	2.64	1.04	10.78
FTSE	8236.95	8320.76	-1.01	-0.28	-1.67	6.51

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	21133.68	20632.30	2.43	15.82	17.48	23.97
Nikkei 225	37919.55	39829.56	-4.80	0.52	-1.88	13.31
Shanghai	3336.50	3087.53	8.06	21.37	17.39	12.15

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	444.60	437.80	1.55	1.81	12.95	50.86
BHP AUS	4471.00	4596.00	-2.72	2.73	15.45	-3.85

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

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

TIME	AREA	TODAY'S EVENTS & RELEASES	PERIOD	EXP.	PREV.
11:00	EA	Inflation Rate y/y Flash	Sep	1.80%	2.20%
11:00	ZA	ABSA Manufacturing PMI	Sep	51.00	43.60
16:00	US	ISM Manufacturing PMI	Sep	48.30	47.20
16:00	US	JOLTS Job Openings	Aug	7.65M	7.67M
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TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
8:00	ZA	M3 Money Supply y/y	Aug	---	6.11%
8:00	ZA	Private Sector Credit y/y	Aug	4.00%	4.95%
14:00	ZA	Balance of Trade	Aug	R15.5B	R5.6B
14:00	ZA	Budget Balance	Aug	R50.0B	R19.4B
19:55	US	Fed Chair Powell Speech	---	---	---

JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Afrimat Limited	AFT	6828	3.11	4.98	8.38	
Kumba Iron Ore Ltd	KIO	40100	2.87	18.88	-34.77	
Blue Label Telecoms Ltd	BLU	528	2.52	8.20	36.08	
Montauk Renewables Inc	MKR	9500	1.76	10.23	-44.77	
Alexander Forbes Grp Hldgs	AFH	720	1.55	0.56	9.09	
Sasol Limited	SOL	11605	1.45	-5.69	-37.37	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Metair Investments Ltd	MTA	1305	-6.79	-11.47	-26.48	
DRD Gold Ltd	DRD	1640	-5.80	-7.40	3.99	
Harmony GM Co Ltd	HAR	17814	-5.24	-4.97	48.96	
Sibanye Stillwater Ltd	SSW	1785	-5.15	-3.09	-28.31	
Altron Limited A	AEL	1730	-5.00	2.00	68.78	

DIVIDEND DATA

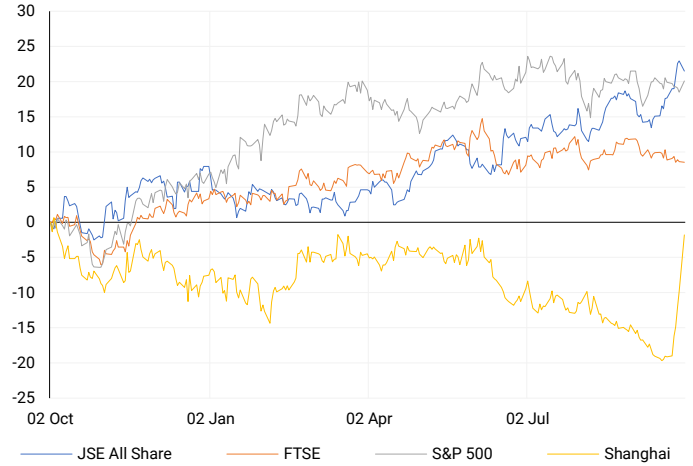
COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
African Rainbow Minerals	ARI	900 ZARc	Motus Holdings	MTH	285 ZARc
Exxaro Resources	EXX	796 ZARc	Truworths International	TRU	197 ZARc
Metrofile Holdings	MFL	7 ZARc	Schroder European Real Estate	SCD	1.48 EURc
Attacq	ATT	39 ZARc	---	---	---
Super Group	SPG	60 ZARc	---	---	---

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

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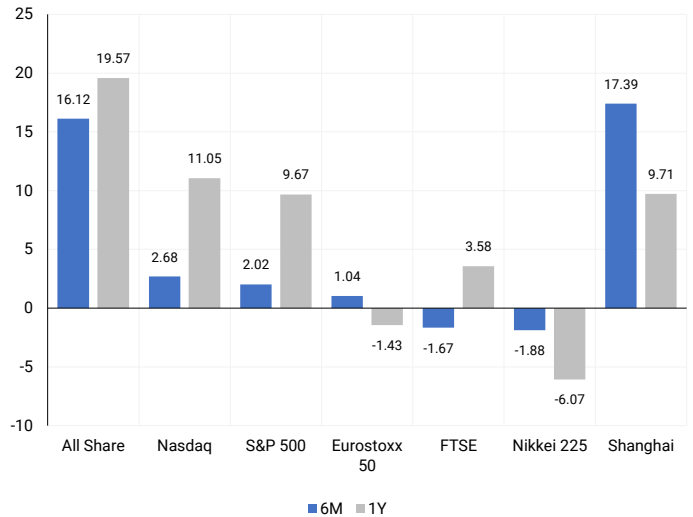
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



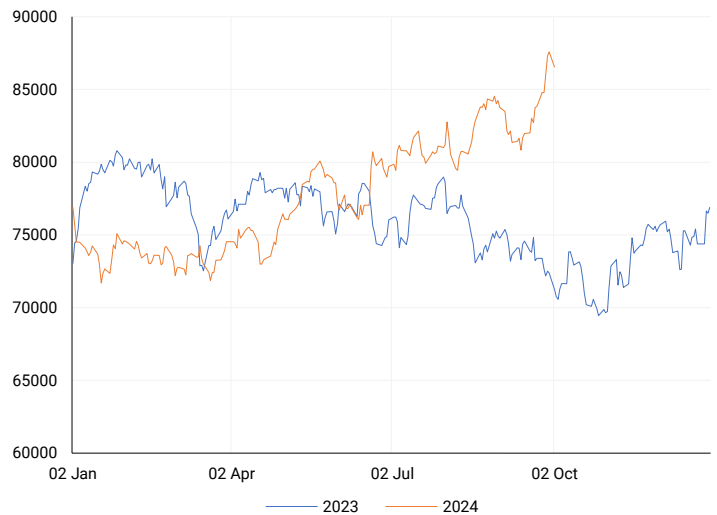
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



Last date to trade Tue, 01 October

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

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	17544	17815	-1.52	-0.09	-0.24	7.17
Anglo American plc	55916	55766	0.27	14.43	8.44	18.09
Anglo American Plat Ltd	62037	64309	-3.53	-0.23	0.78	-35.65
Anglogold Ashanti Ltd	45899	47800	-3.98	-8.81	-13.22	29.87
Anheuser-Busch InBev SA NV	114054	113763	0.26	4.34	5.15	-4.97
BHP Group Limited	53510	52900	1.15	13.18	9.90	-15.52
BID Corporation Ltd	44275	44558	-0.64	-1.20	-1.42	3.77
British American Tob plc	62993	63660	-1.05	-3.83	-4.57	16.33
Compagnie Fin Richemont	273493	272489	0.37	17.26	-2.24	6.52
Capitec Bank Hldgs Ltd	304451	309519	-1.64	-1.10	4.05	50.25
Discovery Ltd	17180	17208	-0.16	0.70	12.29	19.57
Firststrand Ltd	8306	8487	-2.13	-3.26	-3.40	12.99
Gold Fields Ltd	26883	27940	-3.78	-1.31	8.43	-3.22
Glencore plc	9880	9747	1.36	11.20	5.84	-11.51
Impala Platinum Hlgs Ltd	9676	9965	-2.90	-4.57	25.66	6.02
Kumba Iron Ore Ltd	40100	38982	2.87	18.88	13.63	-34.77
Mondi plc	32683	32834	-0.46	1.69	-5.23	-9.96
MTN Group Ltd	9183	9525	-3.59	-3.66	3.34	-20.49
Naspers Ltd -N-	419490	421983	-0.59	13.96	14.06	34.11
Prosus N.V.	75624	75862	-0.31	14.53	14.33	34.95
South32 Limited	4374	4362	0.28	16.64	17.27	3.67
Standard Bank Group Ltd	24235	24645	-1.66	-2.44	0.98	16.46
Shoprite Holdings Ltd	29578	30276	-2.31	-3.60	-4.61	7.54
Sanlam Limited	8800	8940	-1.57	-0.12	-1.00	20.88
Sasol Limited	11605	11439	1.45	-5.69	-15.65	-37.37
Sibanye Stillwater Ltd	1785	1882	-5.15	-3.09	3.60	-28.31
Vodacom Group Ltd	10947	11338	-3.45	-2.86	-0.52	3.27

SOUTH AFRICAN MARKET SUMMARY

SELECTED ITEMS

On the stock market, the Top-40 index fell by 1.26% on Monday. SARB data revealed that private sector credit growth in August rose to 4.95% year-on-year, signalling potential economic momentum for South Africa. The country posted a trade surplus of R5.63 billion (\$327.70 million) and a budget deficit of R19.40 billion in August, according to data from the revenue service and National Treasury. Meanwhile, Spar Group acknowledged that its sales performance for the 47 weeks ending August 23, 2024, was below expectations.

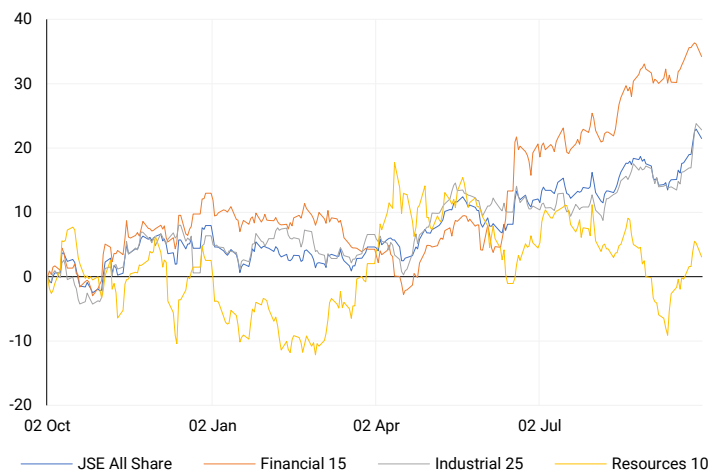
JSE ALL SHARE

One-year



LOCAL INDICES

Normalised percentage performances



EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
Capitec	CPI	Interim	01 Oct '24
Karoo	KRO	Interim	11 Oct '24
PSG	KST	Interim	17 Oct '24
Combined Motor Holdings	CMH	Interim	18 Oct '24
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BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	9250	11.24	Thu, 06 Jun '24
Standard Bank	SBPP	9120	11.15	Thu, 05 Sep '24
Absa	ABSP	83699	11.48	Thu, 12 Sep '24
Capitec	CPIP	10400	9.69	Thu, 19 Sep '24
Steinhoff	SHFF	9734	10.47	Thu, 17 Oct '24
Grindrod	GNDP	9000	12.22	Thu, 19 Sep '24
Netcare	NTCP	8200	11.82	Thu, 31 Oct '24
Discovery	DSBP	9499	11.91	Thu, 19 Sep '24
Invicta	IVTP	---	13.41	Thu, 27 Jun '24

LOCAL SENS ANNOUNCEMENTS

SELECTED RELEASE

THE SPAR GROUP LIMITED – Trading update

For the 47 weeks ending on August 23, 2024, the Group's turnover grew by 4.1%, despite challenges from exchange rate fluctuations and inflation. SPAR Southern Africa saw a total sales increase of 3.5%, with grocery and liquor sales growing by 3.6%. Liquor performed exceptionally well, rising by 10.5%. Overall, retail growth through grocery and liquor stores increased by 6.1%. Build it, SPAR's hardware division, recovered from earlier declines, posting a 1.2% sales rise, supported by reduced load-shedding. Meanwhile, the pharmaceutical business, S Buys, achieved a strong 14.9% turnover growth, driven by increased customer loyalty.

SPP | -2.29% OPEN | 13979c HIGH | 13979c LOW | 13501c CLOSE | 13554c TIME | 07:05

EPE CAPITAL PARTNERS LIMITED – Annual financial results

As of June 30, 2024, the Group's total assets were R2,328.3 million, down from R2,708.1 million in 2023. Non-current assets, primarily unlisted investments, stood at R2,309.2 million, while current assets were R19.1 million. Shareholders' equity decreased to R1,784.4 million from R2,172.1 million, and liabilities remained stable at R543.9 million. The net asset value (NAV) per share fell to R7.03, compared to R8.56 in 2023, with 253,885 shares in issue.

EPE | 0.60% OPEN | 507c HIGH | 507c LOW | 500c CLOSE | 500c TIME | 07:30

YORK TIMBER HOLDINGS LIMITED – Consolidated annual financial results

Revenue for the year increased by 5% to R1,745 million, while adjusted EBITDA decreased by R19.7 million to R90.6 million. Debt rose by R69.7 million, bringing net debt to R406 million. Cash generated from operations dropped by R99.7 million to R28 million. The value of biological assets grew by 11% to R2,825 million, and net working capital increased by 59% to R204.8 million. Earnings per share improved from a loss of 77.43 cents to earnings of 29.34 cents, while headline earnings per share rose from a loss of 75.89 cents to 30.11 cents. Core earnings per share, however, worsened from a loss of 8.04 cents to 10.74 cents. Net asset value per share increased to 608 cents, but no dividend was declared for the year ending June 30, 2024.

YRK | 0.00% OPEN | 225c HIGH | 225c LOW | 225c CLOSE | 225c TIME | 08:00

MC MINING LIMITED – Audited results

For the period, the company's loss after tax increased by 232% to \$14.6 million (3.54 cents per share), up from \$4.4 million (1.46 cents per share) in FY2023. Non-cash charges, including a net impairment of \$0.9 million, rose by 59% to \$5.9 million. Revenue fell by 18% to \$36.7 million, while cost of sales dropped by 11%, leading to a gross profit decline from \$3.6 million in FY2023 to \$0. Administrative expenses surged by 73% due to increased staffing and activities related to the Makhado and Vele projects. Finance costs decreased by 12%, but unrestricted cash balances dropped sharply to \$0.2 million. The net asset value decreased by 14% to \$75.4 million, and headline loss per share rose by 127%. No dividend was declared. Concerns about the company's financial viability were also highlighted.

MCZ | -4.89% OPEN | 175c HIGH | 175c LOW | 175c CLOSE | 175c TIME | 12:30

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmacare Hldgs Ltd	APN	19500	19532	-0.16	-18.75	-4.18
African Rainbow Min Ltd	ARI	18936	18755	0.97	8.83	-5.32
AVI Ltd	AVI	11000	10926	0.68	8.12	34.03
Barloworld Ltd	BAW	8658	8614	0.51	-7.84	9.59
Bidvest Ltd	BVT	29279	29038	0.83	0.55	16.05
Bytes Technology Grp PLC	BYI	11879	12014	-1.12	5.96	-17.05
Capital&Counties Prop plc	CCO	3377	3441	-1.86	-0.82	3.91
Clicks Group Ltd	CLS	39697	39767	-0.18	6.23	21.88
Dis-Chem Pharmacies Ltd	DCP	3795	3808	-0.34	8.43	23.66
Exxaro Resources Ltd	EXX	17206	17151	0.32	7.54	-15.85
Fortress Real Est INV B	FFB	2060	2060	0.00	6.74	43.45
Growthpoint Prop Ltd	GRT	1403	1414	-0.78	-0.50	20.12
Harmony GM Co Ltd	HAR	17814	18800	-5.24	-0.07	48.96
Hammerson plc	HMN	7345	7430	-1.14	9.79	980.15
Investec Ltd	INL	13119	13189	-0.53	-3.27	4.46
Investec plc	INP	13100	13235	-1.02	-3.31	4.01
Italtile Ltd	ITE	1251	1280	-2.27	-0.64	11.70
Life Healthc Grp Hldgs Ltd	LHC	1600	1626	-1.60	11.34	-12.90
MultiChoice Group Ltd	MCG	10900	10831	0.64	-1.12	34.53
Montauk Renewables Inc	MKR	9500	9336	1.76	10.07	-44.77
Mr Price Group Ltd	MRP	27022	26881	0.52	11.48	72.32
Momentum Met Hldgs Ltd	MTM	2947	2940	0.24	5.59	34.63
Ninety One Plc	N91	4054	4062	-0.20	3.60	-5.98
Nedbank Group Ltd	NED	29897	30461	-1.85	0.77	38.26
Northam Platinum Hldgs Ltd	NPH	10904	11099	-1.76	3.42	-22.35
NEPI Rockcastle N.V.	NRP	14589	14612	-0.16	1.15	15.44
Netcare Limited	NTC	1541	1520	1.38	13.48	8.22
Ninety One Limited	NY1	4089	4096	-0.17	5.03	-4.84
Old Mutual Limited	OMU	1370	1380	-0.72	6.20	4.90
OUTsurance Group Ltd	OUT	5804	5879	-1.28	21.60	37.54
Pick n Pay Stores Ltd	PIK	2583	2587	-0.15	6.30	11.00
Pepkor Holdings Ltd	PPH	2409	2424	-0.62	10.00	22.72
Quilter Plc	QLT	3072	3067	0.16	-5.16	26.52
Redefine Properties Ltd	RDF	499	502	-0.60	4.83	29.61
Remgro Ltd	REM	15733	15871	-0.87	8.87	-3.17
Resilient REIT Limited	RES	5874	5966	-1.54	2.75	32.63
Reinet Investments S.C.A	RNI	47884	48050	-0.35	0.12	2.71
Sappi Ltd	SAP	4845	4806	0.81	6.67	9.62
Santam Limited	SNT	36800	36591	0.57	4.68	28.42
The Spar Group Ltd	SPP	13554	13871	-2.29	5.78	14.96
Sirius Real Estate Ltd	SRE	2218	2279	-2.68	-2.08	0.14
Tiger Brands Ltd	TBS	23300	23943	-2.69	-1.10	15.75
Transaction Capital Ltd	TCP	293	292	0.34	6.93	-63.28
The Foschini Group Limited	TFG	15621	15800	-1.13	7.81	40.78
Thungela Resources Ltd	TGA	10975	10935	0.37	-5.55	-28.64
Telkom SA SOC Ltd	TKG	2635	2660	-0.94	-6.76	-11.40
Truworths Int Ltd	TRU	10900	11127	-2.04	11.92	46.60
Woolworths Holdings Ltd	WHL	6811	6761	0.74	5.34	-5.66
Zeda Limited	ZZD	1390	1405	-1.07	5.86	9.02

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

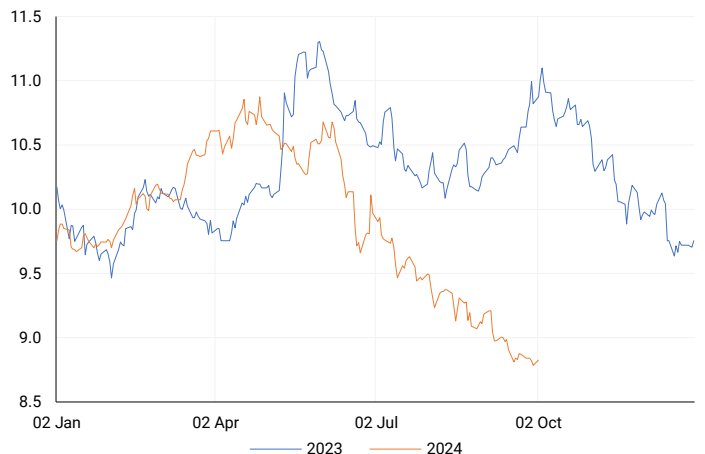
COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	128	129	-0.78	4.92	-21.95
ADVTECH Ltd	ADH	3163	3160	0.09	-2.38	28.89
Altron Limited A	AEL	1730	1821	-5.00	1.76	68.78
AECI Limited	AFE	10349	10343	0.06	-2.37	-5.65
Alexander Forbes Grp Hldgs	AFH	720	709	1.55	9.59	9.09
Afrimat Limited	AFT	6828	6622	3.11	3.39	8.38
African Rainbow Cap Inv	AIL	727	737	-1.36	17.64	48.67
Adcock Ingram Hldgs Ltd	AIP	7018	6971	0.67	8.81	16.77
Astral Foods Ltd	ARL	18906	19070	-0.86	8.34	28.99
Attacq Limited	ATT	1299	1310	-0.84	12.76	40.89
Brait PLC	BAT	147	147	0.00	27.83	-19.23
Blue Label Telecoms Ltd	BLU	528	515	2.52	7.10	36.08
Burstone Group	BTN	960	975	-1.54	16.22	20.00
Coronation Fund Mngrs Ld	CML	3909	3920	-0.28	-3.72	25.45
Curro Holdings Limited	COH	1323	1363	-2.93	0.08	13.56
Cashbuild Ltd	CSB	16100	16144	-0.27	-3.59	-3.55
DRD Gold Ltd	DRD	1640	1741	-5.80	9.26	3.99
Datatec Ltd	DTC	3797	3796	0.03	6.81	-6.25
Emira Property Fund Ltd	EMI	1090	1100	-0.91	0.55	27.49
Equites Prop Fund Ltd	EQU	1440	1447	-0.48	5.88	3.23
Famous Brands Ltd	FBR	6354	6285	1.10	8.41	9.68
Fairvest Limited B	FTB	450	457	-1.53	2.27	30.81
Grindrod Ltd	GND	1510	1512	-0.13	6.56	31.76
Hosken Cons Inv Ltd	HCI	18200	18500	-1.62	-2.10	-10.17
Hudaco Industries Ltd	HDC	19407	19600	-0.98	2.33	20.82
Hyprop Inv Ltd	HYP	4602	4600	0.04	20.38	47.93
JSE Ltd	JSE	12827	12879	-0.40	9.63	38.76
KAP Industrial Hldgs Ltd	KAP	340	339	0.29	2.41	29.77
Karooooo Ltd	KRO	71975	72800	-1.13	4.01	51.53
PSG Konsult Limited	KST	1824	1826	-0.11	5.01	18.83
Libstar Holdings Ltd	LBR	418	415	0.72	-0.48	19.43
Lighthouse Properties plc	LTE	785	791	-0.76	-3.21	6.80
Industrials REIT Limited	MLI	1.7	1.6	6.25	51.07	142.86
MAS P.L.C	MSP	1825	1865	-2.14	4.23	5.43
Metair Investments Ltd	MTA	1305	1400	-6.79	-14.98	-26.48
Motus Holdings Ltd	MTH	12149	12200	-0.42	0.57	19.69
Murray & Roberts Hldgs	MUR	285	287	-0.70	-7.47	91.28
Oceana Group Ltd	OCE	6900	6967	-0.96	0.80	-2.36
Omnia Holdings Ltd	OMN	6503	6625	-1.84	2.80	-0.52
Pan African Resource plc	PAN	727	756	-3.84	0.41	77.75
PPC Limited	PPC	391	400	-2.25	-6.46	-2.01
Raubex Group Ltd	RBX	5254	5500	-4.47	6.68	89.54
RFG Holdings Limited	RFG	1648	1605	2.68	-3.63	22.07
Reunert Ltd	RLO	8100	8194	-1.15	4.85	35.14
SA Corp Real Estate Ltd	SAC	307	311	-1.29	12.04	32.33
Super Group Ltd	SPG	2416	2443	-1.11	-12.94	-18.79
Stor-Age Prop REIT Ltd	SSS	1515	1521	-0.39	4.12	16.00
Southern Sun LTD	SSU	775	800	-3.13	16.54	47.62
Sun International Ltd	SUI	4550	4550	0.00	8.59	10.98
Tharisa plc	THA	1800	1840	-2.17	-8.81	19.13
Tsogo Sun Gaming Ltd	TSG	1250	1282	-2.50	5.13	2.04
Vukile Property Fund Ltd	VKE	1826	1835	-0.49	3.05	29.32
Wilson Bayly Hlm-Ovc Ltd	WBO	23134	23199	-0.28	13.64	77.87

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

REGION	YIELD	1D	1M	1Y
United States	3.78%	3	-13	--
United Kingdom	4.00%	3	-1	-43
Germany	2.12%	-1	-18	-72
Japan	0.84%	0	-4	--
South African 10Y	8.85%	5	-38	-206

SOUTH AFRICAN 10-YEAR

2023 vs 2024 to date

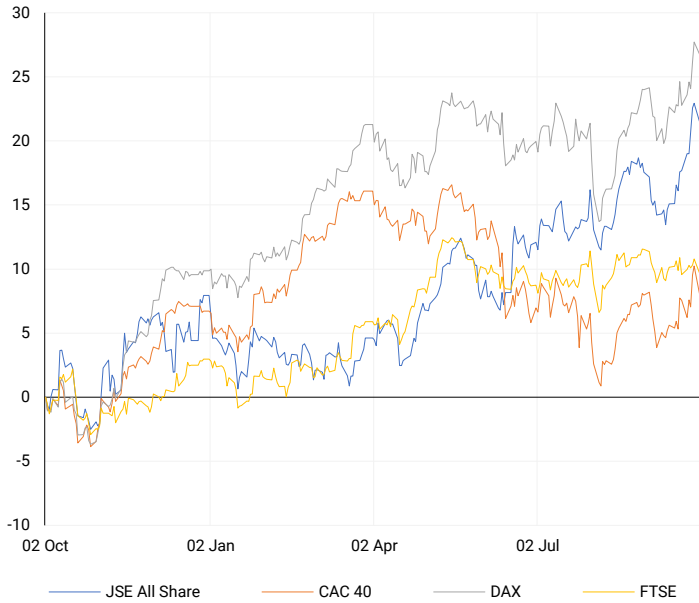


GLOBAL INTEREST RATES | SELECTED ITEMS

REGION	DATE CHANGED	CURRENT RATE
United States	Jul '23	5.25%-5.50%
United Kingdom	Aug '24	5.00%
European	Sep '24	3.65%
SA Repo Rate	Sep '24	8.00%
SA Prime Rate	Sep '24	11.50%

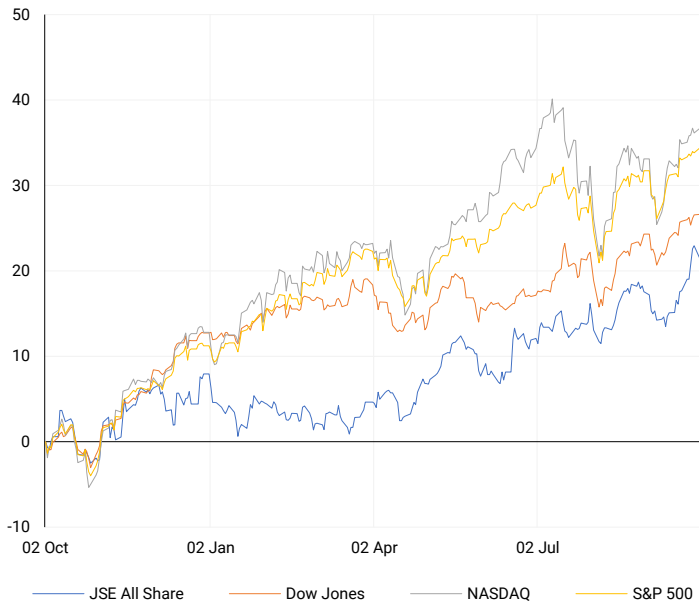
EUROPEAN INDICES

Normalised percentage performances



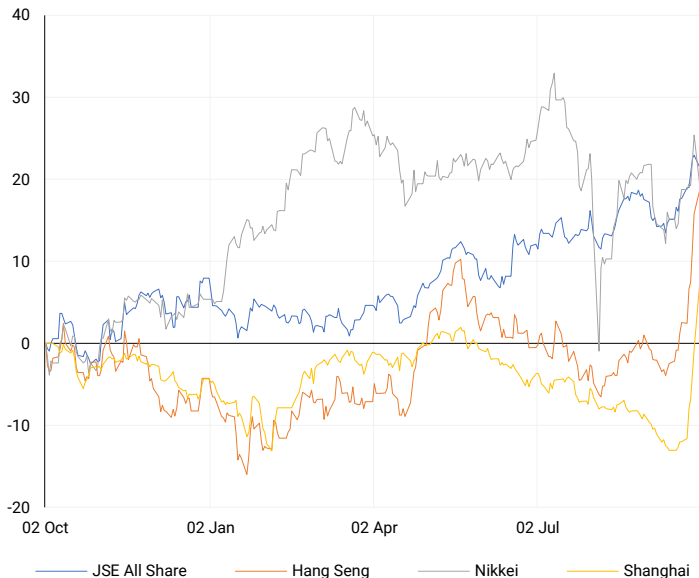
AMERICAN INDICES

Normalised percentage performances



ASIAN INDICES

Normalised percentage performances



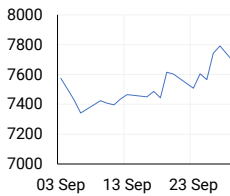
EUROPEAN MARKET SUMMARY

SELECTED ITEMS

European shares declined on Monday as investors grew cautious ahead of a week filled with key economic data and remarks from ECB President Christine Lagarde. In Germany, the harmonized inflation rate dropped to 1.8% in September, down from 2% in August and slightly below the expected 1.9%. This easing inflation could increase the likelihood of another interest rate cut from the European Central Bank (ECB).

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7634.82	7791.79	-2.01	1.69	0.05	1.21
DAX 30	19324.93	19473.63	-0.76	2.54	2.21	15.36
Eurostoxx 50	5009.10	5068.55	-1.17	2.64	1.04	10.78
FTSE	8236.95	8320.76	-1.01	-0.28	-1.67	6.51

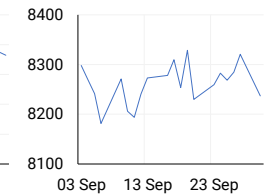
CAC 40



DAX



FTSE



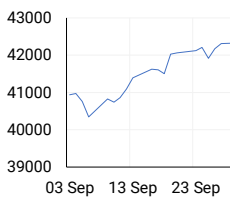
AMERICAN MARKET SUMMARY

SELECTED ITEMS

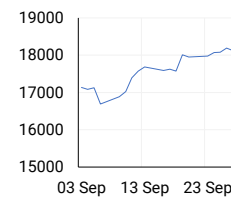
The S&P 500 and Dow both reached record high closings on Monday, recovering from a brief dip after Federal Reserve Chair Jerome Powell said there's no rush to cut interest rates further. Powell mentioned the possibility of two more rate cuts this year if the economy performs as expected. All three major U.S. stock indexes showed gains for the month and quarter. Key economic reports, such as jobless claims and monthly payrolls, are expected later this week.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	42330.15	42313.00	0.04	0.49	1.85	12.31
Nasdaq	18189.17	18119.59	0.38	1.20	2.68	21.17
S&P 500	5762.48	5738.17	0.42	0.77	2.02	20.81
US VIX	16.73	16.96	-1.36	5.29	11.53	34.38

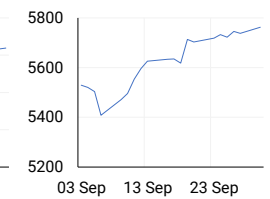
DOW JONES



NASDAQ



S&P 500



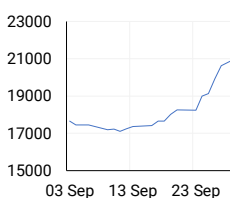
ASIAN MARKET SUMMARY

SELECTED ITEMS

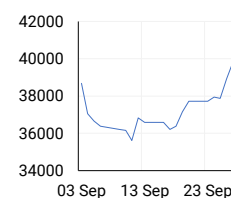
Asian stocks dipped slightly near two-and-a-half-year highs this morning. Japan's Nikkei rebounded 1.5% after a significant drop on Monday, as investors reacted to Shigeru Ishiba's potential win as prime minister. With China's markets closed for the week and Hong Kong's Hang Seng also closed, the recent rally in Asian markets has paused. Traders are focusing on Japan's Tankan survey, which showed steady optimism among large manufacturers (+13) and improved sentiment among non-manufacturers (+34). Japan's unemployment rate also dropped to 2.5% in August, better than expected.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	21133.68	20632.30	2.43	15.82	17.48	23.97
Nikkei 225	37919.55	39829.56	-4.80	0.52	-1.88	13.31
Shanghai	3336.50	3087.53	8.06	21.37	17.39	12.15

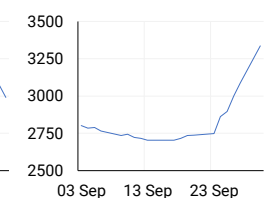
HANG SENG



NIKKEI



SHANGHAI



COMMODITIES MARKET SUMMARY

SELECTED ITEMS

Gold remained just below the record high it reached last week this morning, as investors waited for U.S. labour data to gain insight on potential interest rate cuts. Gold saw a 13% rise from July to September, marking its best quarterly performance in over four years. Meanwhile, oil prices held steady, with the potential for increased supply balancing concerns over the Middle East conflict possibly disrupting exports.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	71.76	71.76	0.00	-0.90	-3.30	-6.90
Gold	2638.14	2634.68	0.13	-0.89	0.23	27.71
Palladium	1003.30	1003.00	0.03	-1.19	-3.75	-8.59
Platinum	985.45	977.80	0.78	-2.34	1.76	-0.96
Silver	31.35	31.16	0.61	-1.45	1.53	30.99

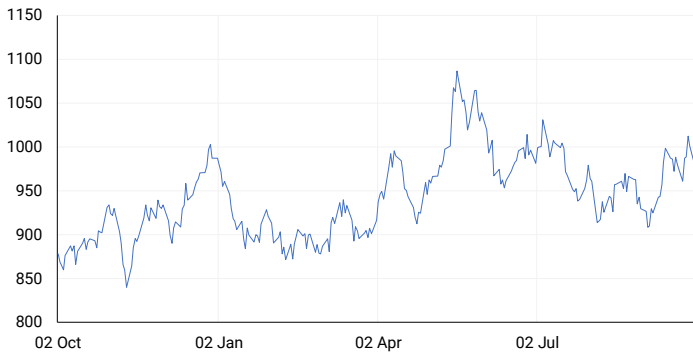
BRENT CRUDE

One-year



PLATINUM

One-year



GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	17.29	17.27	0.07	0.91	-0.46	-5.73
GBPZAR	23.12	23.10	0.06	0.93	-0.21	-0.83
EURZAR	19.25	19.24	0.10	0.66	-0.25	-4.72
AUDZAR	11.95	11.94	0.10	1.07	0.65	-4.13
EURUSD	1.11	1.11	0.03	-0.26	0.21	0.88
USDJPY	144.25	143.64	0.43	1.02	0.02	1.84
GBPUSD	1.34	1.34	-0.02	0.01	0.20	5.05
USDCHF	0.85	0.85	0.09	0.60	-0.23	0.48

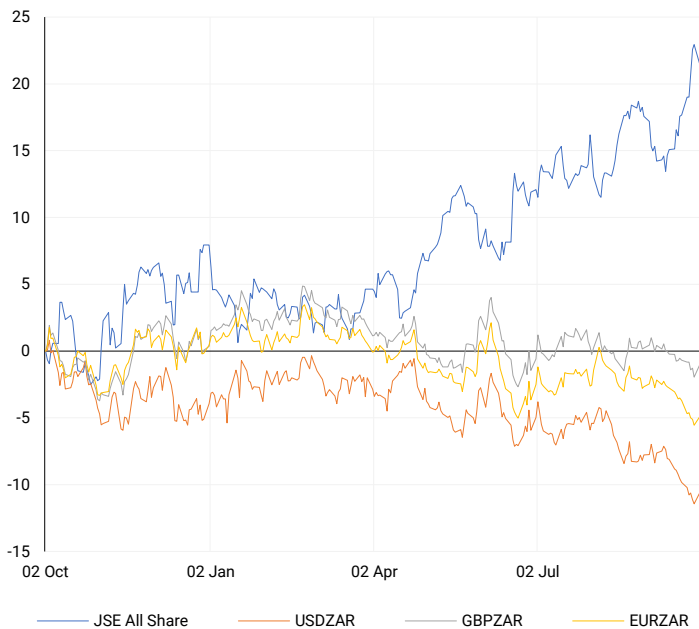
CURRENCY MARKET SUMMARY

SELECTED ITEMS

The South African rand weakened on Monday, pausing after two weeks of gains driven by improved investor sentiment toward the currency. The U.S. dollar strengthened this morning after hawkish remarks from Federal Reserve Chair Jerome Powell, which dampened expectations for significant interest rate cuts.

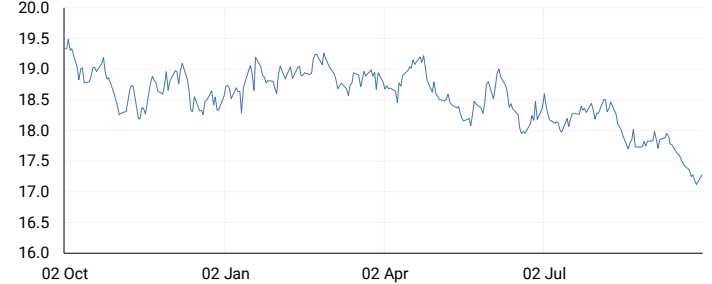
CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



USDZAR

One-year



EURUSD

One-year



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

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