

GLOBAL OVERVIEW | SELECTED INDICES

SOUTH AFRICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
All Share	86752.88	87076.55	-0.37	0.93	3.49	12.82
Top 40	78755.46	79046.53	-0.37	1.20	3.86	11.72
Financial 15	21066.68	21261.94	-0.92	-1.82	-0.30	17.87
Industrial 25	116571.98	116923.64	-0.30	-0.74	2.77	12.39
Resource 10	62788.70	62624.38	0.26	10.00	12.34	9.14
Mid Cap	92062.22	92394.78	-0.36	1.00	2.70	14.49
Small Cap	88782.82	89157.44	-0.42	-0.24	1.40	22.47
Banks	13132.92	13260.91	-0.97	-1.72	-0.96	19.95
Retailers	7704.48	7797.86	-1.20	-1.54	-1.25	23.60
Property (J253) - TR	2378.54	2384.98	-0.27	-2.36	-1.26	27.62

AMERICAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	42924.89	42931.60	-0.02	0.43	2.05	13.89
Nasdaq	18573.13	18540.01	0.18	1.41	3.48	23.73
S&P 500	5851.20	5853.98	-0.05	0.62	2.61	22.67
US VIX	18.20	18.37	-0.93	-11.82	12.69	46.18

EUROPEAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7535.10	7536.23	-0.01	0.17	-0.90	-0.11
DAX 30	19421.91	19451.72	-0.15	-0.33	3.75	15.94
Eurostoxx 50	4944.30	4964.30	-0.40	-1.63	1.47	9.35
FTSE	8306.54	8318.24	-0.14	0.69	0.93	7.41

ASIAN INDICES						
	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	20498.95	20478.46	0.10	0.89	12.27	20.25
Nikkei 225	38411.96	38954.60	-1.39	-3.75	1.82	14.79
Shanghai	3285.87	3268.11	0.54	2.64	20.06	10.45

EARLY MORNING MARKETS						
	LAST	CLOSE	% CHG	1D%	5D%	YTD%
TENCENT	428.20	421.60	1.57	0.14	1.10	45.28
BHP AUS	4228.00	4214.00	0.33	-1.17	-4.25	-11.84

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

INTERNATIONAL ECONOMIC CALENDAR | SELECTED EVENTS

TIME	AREA	TODAY'S EVENTS & RELEASES	PERIOD	EXP.	PREV.
10:00	ZA	Inflation Rate y/y	Sep	4.1%	4.4%
10:00	ZA	Core Inflation Rate y/y	Oct	3.9%	4.1%
16:00	EA	ECB President Lagarde Speech	---	---	---
16:00	US	Existing Home Sales	Sep	3.80M	3.86M
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TIME	AREA	PREVIOUS SESSION'S RELEASES	PERIOD	EXP.	ACT.
9:00	ZA	Leading Business Cycle Indicator m/m	Aug	-0.3%	-0.7%
15:25	GB	BoE Gov Bailey Speech	---	---	---
21:15	EA	ECB President Lagarde Speech	---	---	---
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JSE ALL SHARE | BEST AND WORST ONE-DAY PERFORMERS

BEST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Cashbuild Ltd	CSB	17835	2.78	4.71	6.84	
Sappi Ltd	SAP	5036	1.98	6.40	13.94	
Blue Label Telecoms Ltd	BLU	575	1.77	4.55	48.20	
African Rainbow Min Ltd	ARI	18169	1.66	6.07	-9.16	
Sibanye Stillwater Ltd	SSW	1955	1.61	15.00	-21.49	
Raubex Group Ltd	RBX	5279	1.60	-3.79	90.44	

WORST ONE-DAY % PERFORMERS						
	CODE	CLOSE	1D%	5D%	YTD%	
Sasol Limited	SOL	10812	-5.03	-3.64	-41.65	
Ninety One Limited	NY1	4024	-3.69	-7.90	-6.35	
Ninety One Plc	N91	4000	-2.79	-7.47	-7.24	
Emira Property Fund Ltd	EMI	1120	-2.52	-1.41	30.99	
Coronation Fund Mngrs Ld	CML	3866	-2.37	-1.25	24.07	

DIVIDEND DATA

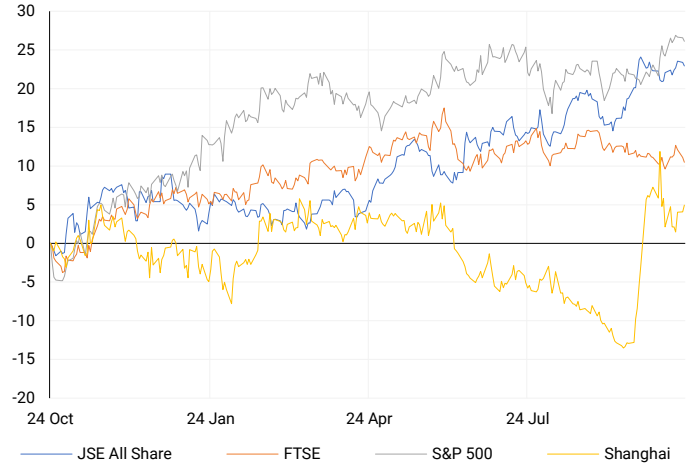
COMPANY	CODE	EXPECTED DIVIDEND	COMPANY	CODE	EXPECTED DIVIDEND
Alphamin Resources	APH	6 CAD	---	---	---
Bowler Metcalf	BCF	37 ZARc	---	---	---
Putprop	PPR	8 ZARc	---	---	---
TeleMasters Holdings	TLM	0.1 ZARc	---	---	---
Wilson Bayly Holmes - Ovcon	WBO	230 ZARc	---	---	---

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

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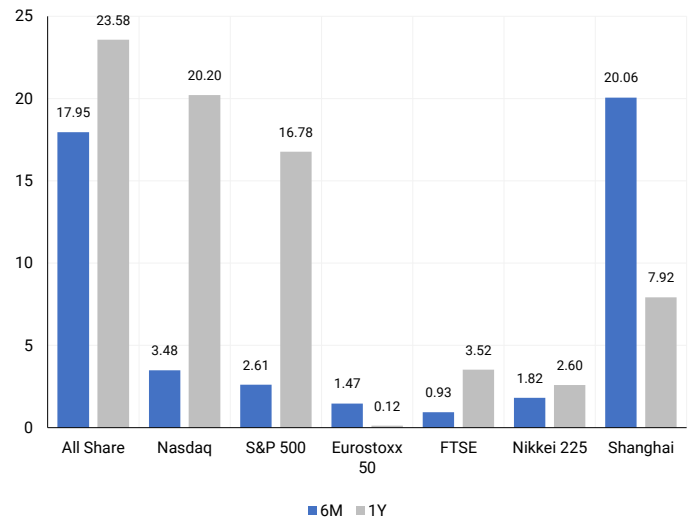
INTERNATIONAL INDICES

Normalised percentage performances - In rand terms



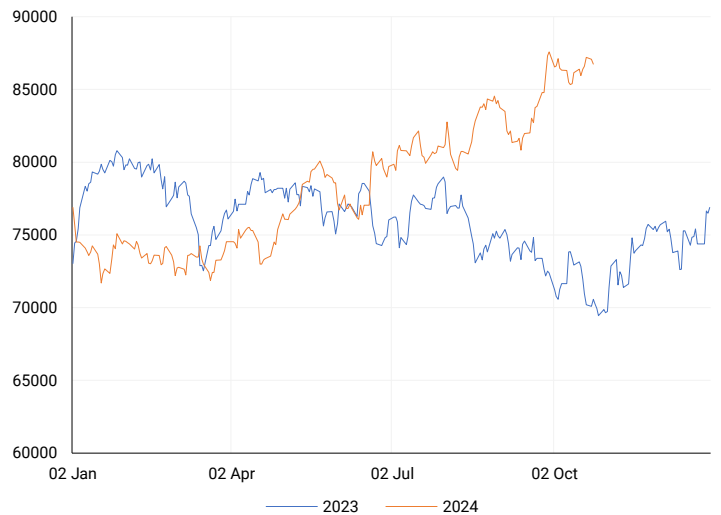
INTERNATIONAL INDICES

6-month & 1-year percentage performances



JSE ALL SHARE INDEX

2023 v 2024 to date



Ex Div Wed, 23 October

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

COMPANY	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Absa Group Limited	16706	16963	-1.52	-1.75	-2.92	2.05
Anglo American plc	54405	54162	0.45	5.92	10.20	14.90
Anglo American Plat Ltd	68016	67150	1.29	11.50	12.52	-29.44
Anglogold Ashanti Ltd	54691	54145	1.01	13.22	11.00	54.75
Anheuser-Busch InBev SA NV	113416	114862	-1.26	-2.65	2.63	-5.50
BHP Group Limited	49600	49737	-0.28	-3.05	4.71	-21.70
BID Corporation Ltd	43590	44141	-1.25	-1.71	-1.67	2.17
British American Tob plc	60710	60390	0.53	-2.83	-6.94	12.11
Compagnie Fin Richemont	257238	258400	-0.45	-1.78	9.10	0.19
Capitec Bank Hldgs Ltd	319271	323659	-1.36	-2.80	4.63	57.56
Discovery Ltd	17345	17619	-1.56	-0.89	5.61	20.72
Firststrand Ltd	8171	8232	-0.74	-0.98	-3.59	11.15
Gold Fields Ltd	32770	32500	0.83	18.18	24.41	17.97
Glencore plc	9282	9354	-0.77	-0.44	5.13	-16.87
Impala Platinum Hlgs Ltd	11127	11155	-0.25	9.55	14.88	21.91
Kumba Iron Ore Ltd	33729	34236	-1.48	-5.67	-1.10	-45.14
Mondi plc	29126	29270	-0.49	-10.66	-9.87	-19.76
MTN Group Ltd	9015	9035	-0.22	4.05	-5.85	-21.95
Naspers Ltd -N-	416519	414181	0.56	1.59	13.22	33.16
Prosus N.V.	74343	74421	-0.10	-0.03	12.59	32.66
South32 Limited	4222	4260	-0.89	-2.34	13.43	0.07
Standard Bank Group Ltd	23750	23960	-0.88	-2.25	-2.42	14.13
Shoprite Holdings Ltd	28050	28357	-1.08	-3.28	-6.58	1.98
Sanlam Limited	8817	8962	-1.62	-0.28	0.58	21.11
Sasol Limited	10812	11385	-5.03	-3.64	-9.90	-41.65
Sibanye Stillwater Ltd	1955	1924	1.61	15.00	8.01	-21.49
Vodacom Group Ltd	10833	10922	-0.81	0.53	-1.77	2.20

## SOUTH AFRICAN MARKET SUMMARY

### SELECTED ITEMS

On Tuesday, South Africa's Top-40 index closed lower, as central bank data revealed a 0.7% drop in the leading business cycle indicator for August, wiping out the previous month's gains. Despite increased business confidence since the coalition government formed in June and stronger retail sales, sectors like mining remain in decline. Attention now shifts to today's September inflation data, with economists expecting a 3.9% year-on-year rate.

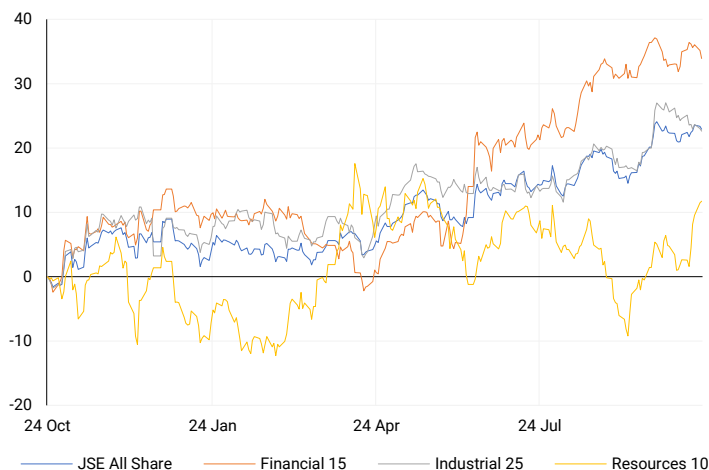
### JSE ALL SHARE

One-year



### LOCAL INDICES

Normalised percentage performances



### EXPECTED COMPANY REPORTING SCHEDULE

COMPANY	CODE	RELEASE	DATE
Famous Brands	FBR	Interim	23 Oct '24
Oasis	OAS	Interim	24 Oct '24
Afrimat	AFT	Interim	24 Oct '24
Datatec	DTC	Interim	24 Oct '24
Pick n Pay	PIK	Interim	28 Oct '24

### BANK AND OTHER SELECTE PREFERENCE SHARES

COMPANY	CODE	CLOSE	CLEAN YIELD	NEXT LDT (Est.)
Investec Limited	INPR	9478	11.24	Thu, 28 Nov '24
Standard Bank	SBPP	9220	11.15	Wed, 02 Apr '25
Absa	ABSP	83995	11.48	Wed, 16 Apr '25
Capitec	CPIP	10500	9.69	Tue, 18 Mar '25
Grindrod	GNDP	9270	12.22	Wed, 02 Apr '25
Netcare	NTCP	8700	11.82	Thu, 31 Oct '24
Discovery	DSBP	9721	11.91	Tue, 18 Mar '25

### LOCAL SENS ANNOUNCEMENTS

#### SELECTED RELEASE

#### WE BUY CARS HOLDINGS LIMITED – Trading Statement

For the year ending September 30, 2024, core headline earnings are expected to increase by 21% to 26%, reaching between R798 million and R832 million, compared to R661 million in 2023. Core headline earnings per share (HEPS) are expected to rise by 7% to 12%, from 197.9 cents to a range of 212.5 to 222.4 cents. However, basic earnings and basic earnings per share (EPS) are expected to drop significantly by 56% to 61%, with basic earnings between R322 million and R364 million, and EPS between 85.4 cents and 97.7 cents, down from R821 million and 245.9 cents in 2023. Headline earnings and HEPS are also forecast to fall by 55% to 60%.

WBC | -1.49% OPEN | 3431c HIGH | 3592c LOW | 3394c CLOSE | 3448c TIME | 08:00

#### SASFIN HOLDINGS LIMITED – Audited Consolidated Annual Financial Statements

For 2024, the group's headline earnings fell drastically to a loss of R58.678 million, a 152.07% decline from a profit of R112.683 million in 2023. Headline earnings per share also plummeted by 152.15% to -190.96 cents. Total income, including associate income, decreased by 7.92% to R1.279 billion, and the group posted a loss of R60.10 million compared to a profit of R108.8 million the previous year. The cost-to-income ratio rose to 95.51%, and return on equity fell sharply to -3.68%. Total assets decreased by 8.34%, and deposits from customers dropped by 4.95%. The capital adequacy ratio slightly declined to 15.87%, and the credit loss ratio increased to 165 basis points.

SFN | 1.85% OPEN | 2725c HIGH | 2760c LOW | 2725c CLOSE | 2760c TIME | 07:10

#### OASIS CRESCENT PROPERTY FUND – Reviewed Condensed Consolidated Interim Results

Total income grew by 10.8% to R71.6 million from R64.6 million in the same period last year. Distributable income also increased by 10.8% to R39.1 million, while distribution per unit (DPU) rose by 11.7% to 59.4 cents. Net asset value per unit (NAVPU) saw a 13.8% increase to 2 757 cents. Headline earnings per unit (HEPU) jumped 23.3% to 111.1 cents, and earnings per unit (EPU) increased by 22% to 108.0 cents, both driven by adjustments on financial assets at fair value.

OAS | 0.00% OPEN | 1950c HIGH | 1950c LOW | 1950c CLOSE | 1950c TIME | 17:30

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

COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
Aspen Pharmacare Hldgs Ltd	APN	18085	18140	-0.30	-4.71	-11.13
African Rainbow Min Ltd	ARI	18169	17873	1.66	2.55	-9.16
AVI Ltd	AVI	10450	10450	0.00	-3.02	27.33
Barloworld Ltd	BAW	8393	8441	-0.57	0.73	6.24
Bidvest Ltd	BVT	27957	28525	-1.99	-1.56	10.81
Bytes Technology Grp PLC	BYI	10933	10930	0.03	-7.71	-23.66
Capital&Counties Prop plc	CCO	3194	3260	-2.02	-8.61	-1.72
Clicks Group Ltd	CLS	37689	37756	-0.18	-2.98	15.71
Dis-Chem Pharmacies Ltd	DCP	3729	3717	0.32	0.70	21.51
Exxaro Resources Ltd	EXX	16927	16729	1.18	7.54	-17.22
Fortress Real Est INV B	FFB	2017	2009	0.40	-0.10	40.46
Growthpoint Prop Ltd	GRT	1311	1321	-0.76	-5.89	12.24
Harmony GM Co Ltd	HAR	21292	21115	0.84	18.62	78.04
Hammerson plc	HMN	7110	7249	-1.92	-3.13	945.59
Investec Ltd	INL	13595	13621	-0.19	2.68	8.25
Investec plc	INP	13615	13641	-0.19	3.54	8.10
Italtile Ltd	ITE	1275	1279	-0.31	5.72	13.84
Life Healthc Grp Hldgs Ltd	LHC	1710	1704	0.35	7.55	-6.91
MultiChoice Group Ltd	MCG	11129	11170	-0.37	4.50	37.36
Montauk Renewables Inc	MKR	9712	9850	-1.40	8.21	-43.53
Mr Price Group Ltd	MRP	25700	25957	-0.99	0.46	63.89
Momentum Met Hldgs Ltd	MTM	2870	2885	-0.52	-1.41	31.11
Ninety One Plc	N91	4000	4115	-2.79	2.41	-7.24
Nedbank Group Ltd	NED	29505	29797	-0.98	-0.24	36.45
Northam Platinum Hldgs Ltd	NPH	12909	12763	1.14	21.12	-8.08
NEPI Rockcastle N.V.	NRP	14208	14130	0.55	-1.99	12.42
Netcare Limited	NTC	1502	1502	0.00	3.37	5.48
Ninety One Limited	NY1	4024	4178	-3.69	2.08	-6.35
Old Mutual Limited	OMU	1258	1274	-1.26	-2.86	-3.68
OUTsurance Group Ltd	OUT	5851	5858	-0.12	2.04	38.65
Pick n Pay Stores Ltd	PIK	2620	2609	0.42	3.56	12.59
Pepkor Holdings Ltd	PPH	2316	2341	-1.07	-0.77	17.98
Quilter Plc	QLT	3277	3325	-1.44	6.92	34.97
Redefine Properties Ltd	RDF	486	491	-1.02	-1.02	26.23
Remgro Ltd	REM	15641	15733	-0.58	7.06	-3.74
Resilient REIT Limited	RES	5563	5600	-0.66	-4.48	25.60
Reinet Investments S.C.A	RNI	47897	47863	0.07	1.67	2.74
Sappi Ltd	SAP	5036	4938	1.98	10.15	13.94
Santam Limited	SNT	37185	37256	-0.19	2.96	29.76
The Spar Group Ltd	SPP	13000	12962	0.29	-4.88	10.26
Sirius Real Estate Ltd	SRE	2110	2133	-1.08	-9.79	-4.74
Tiger Brands Ltd	TBS	23882	24010	-0.53	-1.32	18.64
Transaction Capital Ltd	TCP	296	300	-1.33	19.84	-62.91
The Foschini Group Limited	TFG	14805	15060	-1.69	-6.24	33.43
Thungela Resources Ltd	TGA	12648	12459	1.52	22.24	-17.76
Telkom SA SOC Ltd	TKG	2722	2684	1.42	-0.11	-8.47
Truworths Int Ltd	TRU	10519	10746	-2.11	-0.86	41.48
Woolworths Holdings Ltd	WHL	6520	6557	-0.56	-2.20	-9.70
Zeda Limited	ZZD	1429	1410	1.35	-1.11	12.08

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

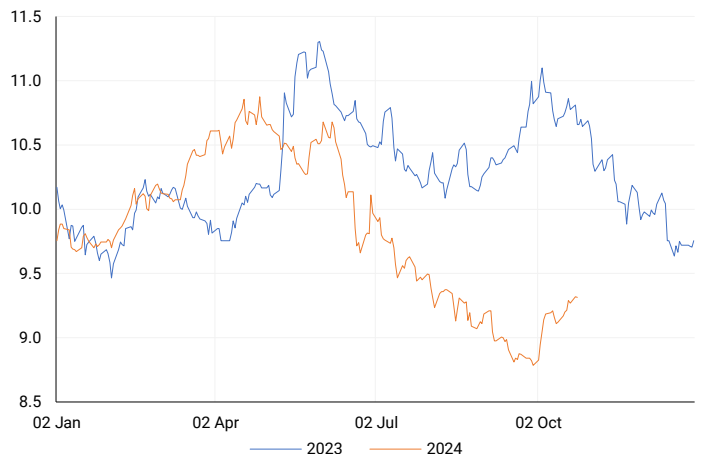
COMPANY	CODE	CLOSE	PREVIOUS	1D%	1M%	YTD%
ArcelorMittal SA Limited	ACL	163	157	3.82	38.14	-0.61
ADVTECH Ltd	ADH	3200	3229	-0.90	7.71	30.40
Altron Limited A	AEL	1901	1885	0.85	11.82	85.46
AECI Limited	AFE	9663	9819	-1.59	-4.62	-11.91
Alexander Forbes Grp Hldgs	AFH	691	701	-1.43	-6.50	4.70
Afrimat Limited	AFT	6664	6756	-1.36	0.82	5.78
African Rainbow Cap Inv	AIL	730	725	0.69	0.69	49.28
Adcock Ingram Hldgs Ltd	AIP	6820	6771	0.72	1.04	13.48
Astral Foods Ltd	ARL	17256	17355	-0.57	-4.86	17.73
Attacq Limited	ATT	1301	1319	-1.36	-1.89	41.11
Brait PLC	BAT	157	157	0.00	24.60	-13.74
Blue Label Telecoms Ltd	BLU	575	565	1.77	22.60	48.20
Burstone Group	BTN	956	965	-0.93	2.80	19.50
Coronation Fund Mngrs Ld	CML	3866	3960	-2.37	4.32	24.07
Curro Holdings Limited	COH	1277	1275	0.16	-1.77	9.61
Cashbuild Ltd	CSB	17835	17353	2.78	12.88	6.84
DRD Gold Ltd	DRD	2181	2171	0.46	24.34	38.30
Datatec Ltd	DTC	3751	3747	0.11	4.40	-7.38
Emira Property Fund Ltd	EMI	1120	1149	-2.52	4.19	30.99
Equites Prop Fund Ltd	EQU	1464	1462	0.14	0.55	4.95
Famous Brands Ltd	FBR	6731	6698	0.49	15.20	16.19
Fairvest Limited B	FTB	474	475	-0.21	4.41	37.79
Grindrod Ltd	GND	1525	1534	-0.59	1.80	33.07
Hosken Cons Inv Ltd	HCI	18759	18756	0.02	3.41	-7.41
Hudaco Industries Ltd	HDC	19364	19370	-0.03	1.92	20.55
Hyprop Inv Ltd	HYP	4183	4215	-0.76	-7.04	34.46
JSE Ltd	JSE	12449	12516	-0.54	3.04	34.67
KAP Industrial Hldgs Ltd	KAP	335	340	-1.47	0.30	27.86
Karooooo Ltd	KRO	69000	69000	0.00	-5.09	45.27
PSG Konsult Limited	KST	1892	1915	-1.20	5.88	23.26
Libstar Holdings Ltd	LBR	430	420	2.38	2.14	22.86
Lighthouse Properties plc	LTE	788	794	-0.76	-0.88	7.21
Industrials REIT Limited	MLI	2.4	2.4	0.00	26.32	242.86
MAS P.L.C	MSP	1807	1800	0.39	-1.42	4.39
Metair Investments Ltd	MTA	1176	1174	0.17	-17.82	-33.75
Motus Holdings Ltd	MTH	11649	11900	-2.11	-2.44	14.77
Murray & Roberts Hldgs	MUR	250	250	0.00	-16.39	67.79
Oceana Group Ltd	OCE	6561	6670	-1.63	-1.10	-7.16
Omnia Holdings Ltd	OMN	6666	6614	0.79	5.71	1.97
Pan African Resource plc	PAN	869	864	0.58	11.41	112.47
PPC Limited	PPC	388	393	-1.27	-3.00	-2.76
Raubex Group Ltd	RBX	5279	5196	1.60	-5.73	90.44
RFG Holdings Limited	RFG	1700	1675	1.49	8.28	25.93
Reunert Ltd	RLO	7800	7828	-0.36	1.04	30.13
SA Corp Real Estate Ltd	SAC	283	282	0.35	-5.98	21.98
Super Group Ltd	SPG	2304	2342	-1.62	-3.96	-22.55
Stor-Age Prop REIT Ltd	SSS	1515	1515	0.00	-0.33	16.00
Southern Sun LTD	SSU	829	840	-1.31	7.52	57.90
Sun International Ltd	SUI	4439	4450	-0.25	-5.29	8.27
Tharisa plc	THA	1600	1595	0.31	-12.57	5.89
Tsogo Sun Gaming Ltd	TSG	1214	1220	-0.49	-4.11	-0.90
Vukile Property Fund Ltd	VKE	1855	1865	-0.54	2.54	31.37
Wilson Bayly Hlm-Ovc Ltd	WBO	21640	21777	-0.63	-2.80	66.38

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

REGION	YIELD	1D	1M	1Y
United States	4.23%	3	49	--
United Kingdom	4.16%	3	26	-48
Germany	2.32%	4	11	-57
Japan	0.96%	2	14	--
South African 10Y	9.33%	-2	48	-150

**SOUTH AFRICAN 10-YEAR**

2023 vs 2024 to date

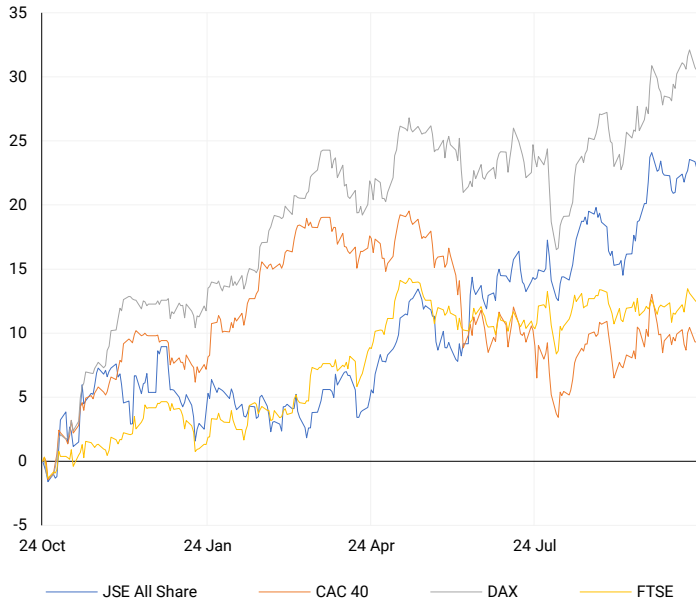


**GLOBAL INTEREST RATES | SELECTED ITEMS**

REGION	DATE CHANGED	CURRENT RATE
United States	Sep '24	4.75%-5.00%
United Kingdom	Aug '24	5.00%
European	Oct '24	3.40%
SA Repo Rate	Sep '24	8.00%
SA Prime Rate	Sep '24	11.50%

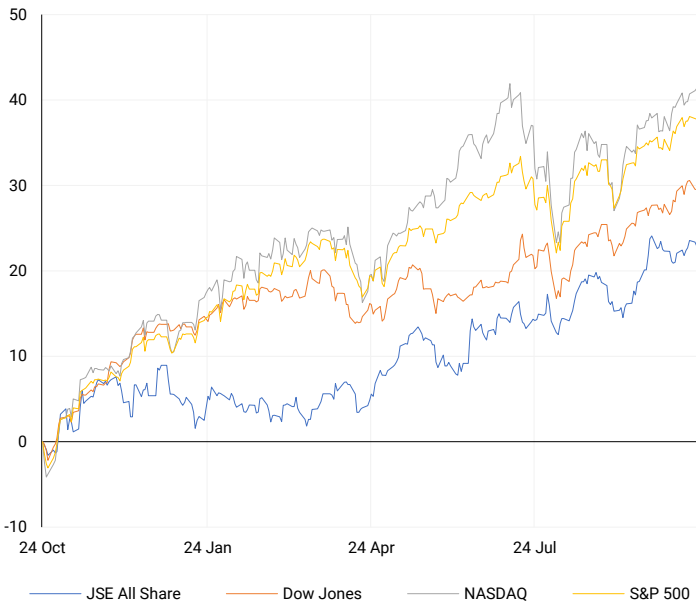
## EUROPEAN INDICES

Normalised percentage performances



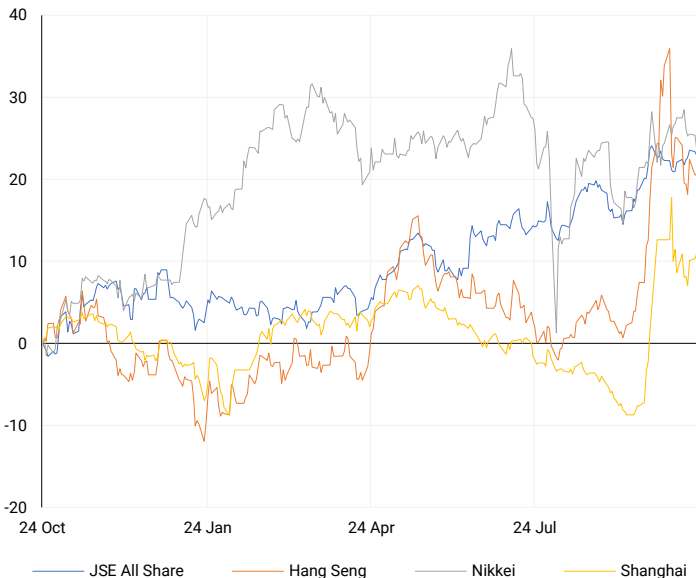
## AMERICAN INDICES

Normalised percentage performances



## ASIAN INDICES

Normalised percentage performances



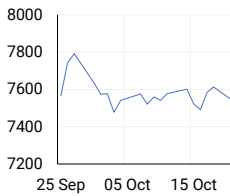
## EUROPEAN MARKET SUMMARY

### SELECTED ITEMS

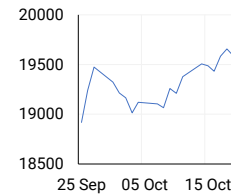
European stocks declined on Tuesday, with investors grappling with uncertainty around geopolitics and potential global interest rate cuts. However, strong guidance from German tech giant SAP helped limit some losses in the tech sector. The IMF projected that Germany, a manufacturing leader, will see zero growth in 2024, which could drag down overall euro zone performance. Traders now expect the European Central Bank to reduce interest rates by around 130 basis points by the end of 2025, following ECB President Christine Lagarde's comments that inflation may return to 2% faster than anticipated.

EUROPEAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
CAC 40	7535.10	7536.23	-0.01	0.17	-0.90	-0.11
DAX 30	19421.91	19451.72	-0.15	-0.33	3.75	15.94
Eurostoxx 50	4944.30	4964.30	-0.40	-1.63	1.47	9.35
FTSE	8306.54	8318.24	-0.14	0.69	0.93	7.41

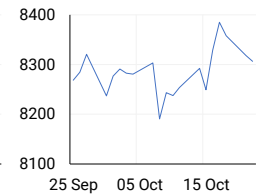
### CAC 40



### DAX



### FTSE



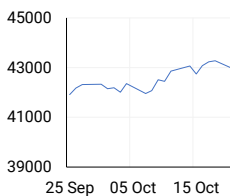
## AMERICAN MARKET SUMMARY

### SELECTED ITEMS

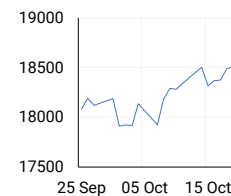
U.S. stocks ended mostly flat on Tuesday, with the Nasdaq making a small gain as investors closely monitored Treasury yields and awaited further earnings reports to gauge the strength of U.S. companies. Equity markets are expected to remain volatile in the coming weeks as investors focus on company earnings, new economic data, the results of the U.S. election, and an upcoming Federal Reserve meeting. Traders are currently anticipating an 89.6% chance of a 25-basis-point interest rate cut in November, according to CME's FedWatch tool.

AMERICAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Dow Jones	42924.89	42931.60	-0.02	0.43	2.05	13.89
Nasdaq	18573.13	18540.01	0.18	1.41	3.48	23.73
S&P 500	5851.20	5853.98	-0.05	0.62	2.61	22.67
US VIX	18.20	18.37	-0.93	-11.82	12.69	46.18

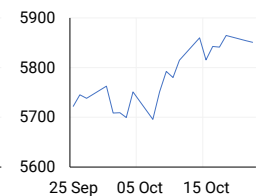
### DOW JONES



### NASDAQ



### S&P 500



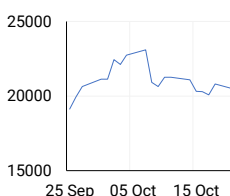
## ASIAN MARKET SUMMARY

### SELECTED ITEMS

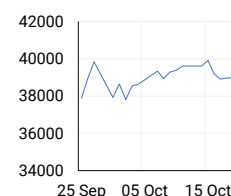
Asia-Pacific markets mostly rose on Tuesday, diverging from Wall Street trends, as Tokyo Metro's successful market debut fuelled investor optimism. Shares of the Japanese subway operator surged 45% in early trading following its IPO, which raised 348.6 billion yen, the largest in Japan since 2018. The IPO was 15 times oversubscribed, with shares priced at 1,200 yen each. Looking ahead, Asia will release key economic data, including Singapore's September inflation, which is expected to slow to 1.9%, the lowest since March 2021. Meanwhile, China and Hong Kong stocks opened steadily this morning, buoyed by potential government economic support.

ASIAN INDICES	CLOSE	PREVIOUS	1D%	5D%	1M%	YTD%
Hang Seng	20498.95	20478.46	0.10	0.89	12.27	20.25
Nikkei 225	38411.96	38954.60	-1.39	-3.75	1.82	14.79
Shanghai	3285.87	3268.11	0.54	2.64	20.06	10.45

### HANG SENG



### NIKKEI



### SHANGHAI



## COMMODITIES MARKET SUMMARY

### SELECTED ITEMS

Gold prices surged to a record high of \$2,749.07 in early trading today, driven by heightened demand for safe-haven assets amid the Middle East conflict, uncertainty surrounding the Federal Reserve's outlook, and the upcoming U.S. election. The metal later eased slightly to settle around \$2,743.42. Meanwhile, oil prices dipped this morning after data showed a larger-than-expected rise in U.S. crude inventories. Market attention remains focused on ongoing diplomatic efforts in the Middle East as Israel continues its attacks on Gaza and Lebanon.

COMMODITY	LAST	CLOSE	% CHG	1D%	5D%	YTD%
Brent Crude	75.95	75.59	0.48	2.12	1.16	-1.93
Gold	2749.60	2748.92	0.02	1.07	3.23	33.25
Palladium	1082.89	1083.75	-0.08	2.43	6.88	-1.23
Platinum	1037.50	1032.25	0.51	2.46	4.46	4.56
Silver	34.67	34.86	-0.55	3.18	10.67	46.54

## BRENT CRUDE

One-year



## PLATINUM

One-year



## GOLD

One-year



CURRENCY PAIR	LAST	CLOSE	% CHG	1D%	5D%	YTD%
USDZAR	17.55	17.57	-0.09	-0.30	-0.46	-4.12
GBPZAR	22.80	22.77	0.10	-0.42	-1.27	-2.25
EURZAR	18.96	18.94	0.13	-0.63	-1.47	-6.20
AUDZAR	11.72	11.72	0.02	-0.11	-0.89	-5.93
EURUSD	1.08	1.08	0.03	-0.15	-0.85	-2.16
USDJPY	152.00	151.08	0.60	0.16	1.26	7.12
GBPUSD	1.30	1.30	0.02	0.00	-0.68	1.98
USDCHF	0.87	0.87	0.19	-0.08	0.39	2.84

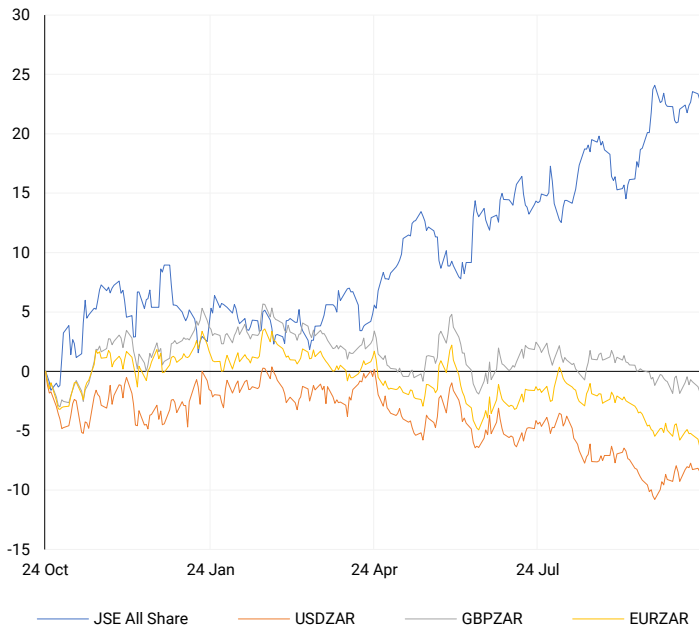
## CURRENCY MARKET SUMMARY

### SELECTED ITEMS

The South African rand strengthened on Tuesday, supported by rising global precious metals prices and its attractiveness for carry trades, where investors borrow in low-interest-rate currencies to invest in higher-yielding assets like the rand. The U.S. dollar remained near a 2-1/2-month high this morning as investors adjusted their expectations for a more gradual pace of interest rate reductions. Market participants are also closely watching the tight U.S. presidential election race, which is adding to the uncertainty and influencing currency market movements.

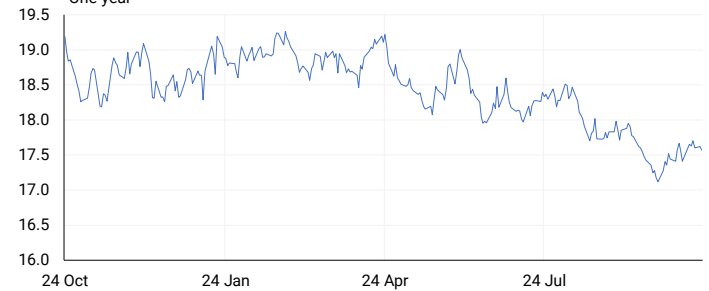
## CURRENCY PAIRS vs JSE ALL SHARE

Normalised percentage performances



## USDZAR

One-year



## EURUSD

One-year



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

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