

# Daily Global Markets Update




Skybound  
CAPITAL

2019/07/30	Snapshot:	USD/ZAR	R 14,16	EUR/ZAR	R 15,79	GBP/ZAR	R 17,31
		GBP/USD	1,21	EUR/USD	1,11	AUD/USD	0,69

## Global Indices

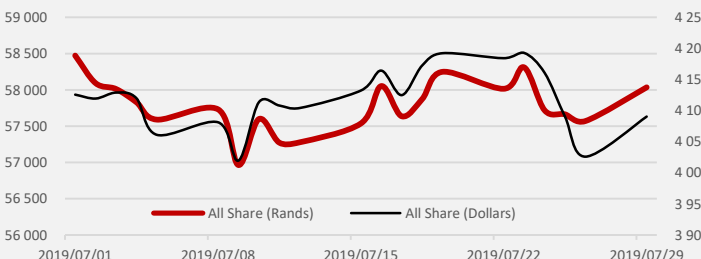
Region	Index	Close	Daily % Change	MTD % Change	YTD % Change	12 MTH % Change
South Africa	JSE All Share	58 034,77	0,81%	-0,29%	10,05%	1,26%
	JSE Africa Resource 20	46 227,51	0,80%	-3,60%	12,62%	12,84%
	JSE Africa Industrial 25	74 167,37	0,87%	3,38%	16,46%	0,01%
	JSE Africa Finance 15	16 206,16	1,11%	-4,63%	-1,06%	-4,57%
	United States	S&P 500	3 020,97	-0,16%	2,69%	20,51%
	Dow Jones Industrial	27 221,35	0,11%	2,34%	16,69%	7,57%
	Nasdaq Composite	8 293,33	-0,44%	3,59%	24,99%	8,69%
	MSCI World	2 212,50	-0,14%	1,57%	17,44%	2,99%
Europe	FTSE 100 (United Kingdom)	7 686,61	1,82%	3,51%	14,25%	-0,18%
	DAX 30 (Germany)	12 417,47	-0,02%	0,15%	17,60%	-2,97%
	CAC 40 (France)	5 601,10	-0,16%	1,12%	18,40%	2,00%
	Stoxx Euro 600	390,85	0,03%	1,55%	15,76%	-0,02%
	Asia	Shanghai Composite	2 941,01	-0,12%	-0,88%	18,39%
	Hang Seng Index	28 106,41	-1,03%	-1,27%	9,04%	-1,92%
	Nikkei 225 (Japan)	21 616,80	-0,19%	1,92%	8,34%	-3,82%
	MSCI Emerging Markets	1 045,73	-0,28%	-0,87%	8,28%	-4,07%

## Market Commentary




### South Africa

JSE All Share Index (ZAR - 30 days)

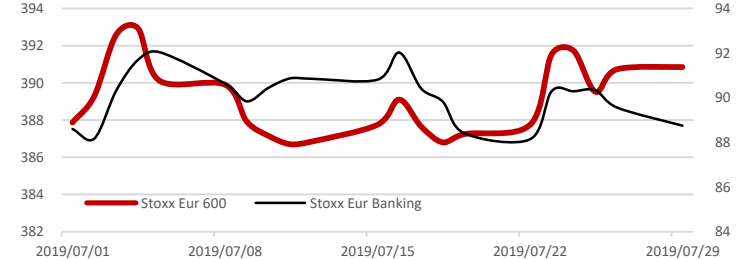


The JSE and the Top 40 Index ended Monday's session trading higher, up 0.81% and 0.88% respectively, with financial shares featuring as the region's top performer, up 1.11%. Industrial shares were also trading in positive territory, up 0.87%, followed by resource shares, up 0.80%, supported by 2.72% gain by Anglo American Platinum. In other news, Eskom is expected to publish its annual financial statements today, with many expecting the announcement of record losses for the year ended March 2019. The Rand strengthened against major currencies from a four-week low against the dollar.




### Europe

Stoxx Europe 600 Index (EUR - 30 Days)

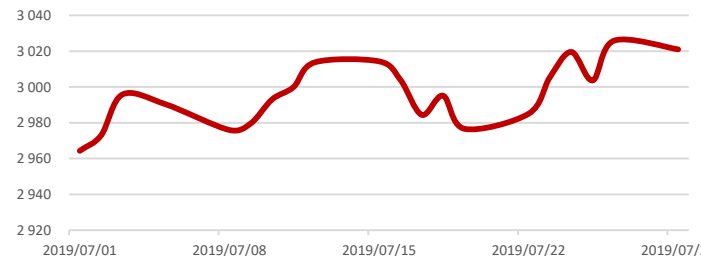


European equities ended trading in a mixed fashion amid lingering concerns regarding an economic slowdown and geopolitical tensions. Overall, the STOXX 600 closed marginally higher, up 0.03%, with the FTSE 100 leading the region's gains, up 1.82%. In the UK market, Just Eat added 22.72% after they agreed on the key terms of an agreement with Takeaway.com of a possible all-share combination. The French CAC 40 and the German DAX 30 ended trading in negative territory, down 0.16% and 0.02% respectively.




### United States

S&P 500 Index (USD - 30 days)

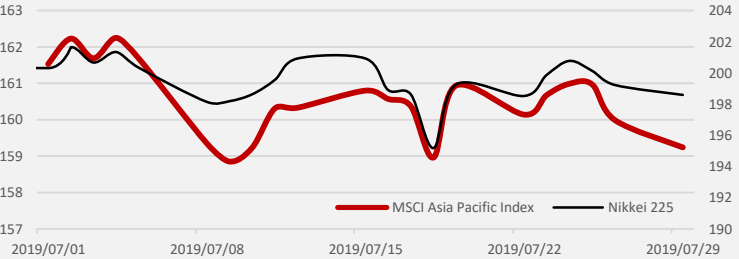


US equities ended Monday's session trading lower, with the exception of the Dow Jones, in a cautious trading session ahead of the Federal Reserve's highly anticipated monetary policy announcement on Wednesday. The NASDAQ featured as the region's worst performer, down 0.44%, followed by the S&P 500, down 0.16%. In contrast, the Dow Jones managed to add 0.11% by the close, settling at 27 221.35 index points. Among specific shares, Beyond Meat ended 5.44% lower after releasing its second earnings announcement since going public in May. Shares have risen nearly 840% since their debut.



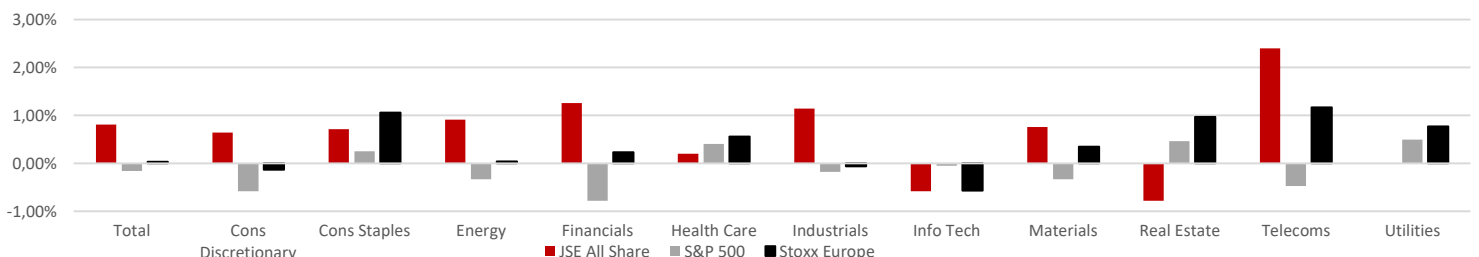
### China and Asia

MSCI Asia Pacific Index (USD - 30 days)

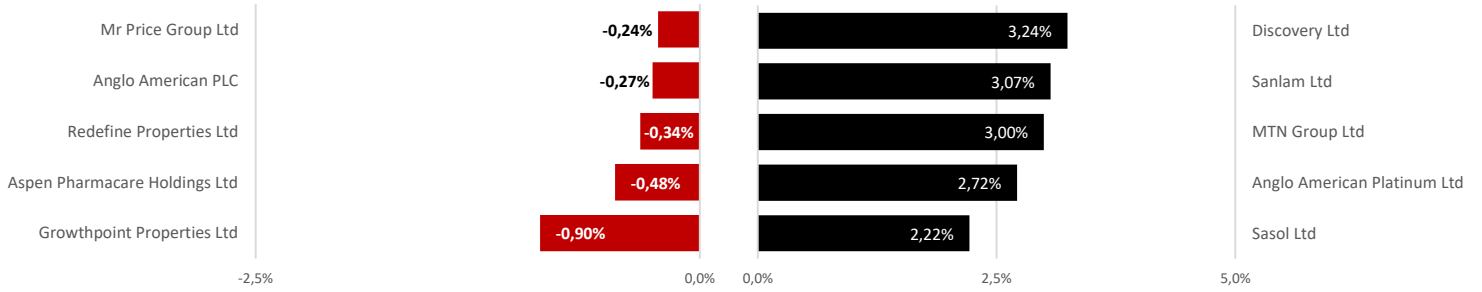


Asian equities gained in early trading Tuesday, ahead of the first round of trade negotiations between the US and China since early May, due to start today. At the time of writing, the Japanese Nikkei 225 Index led the region's gains, up 0.43%, following the announcement from the Bank of Japan that it will leave its monetary policy unchanged and maintained that rates will stay low at least through spring 2020. The Shanghai Composite Index and the Hang Seng Index were also trading higher, up 0.36% and 0.27% respectively.

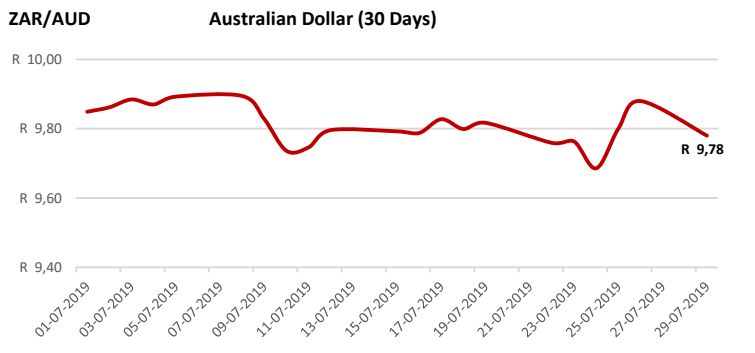
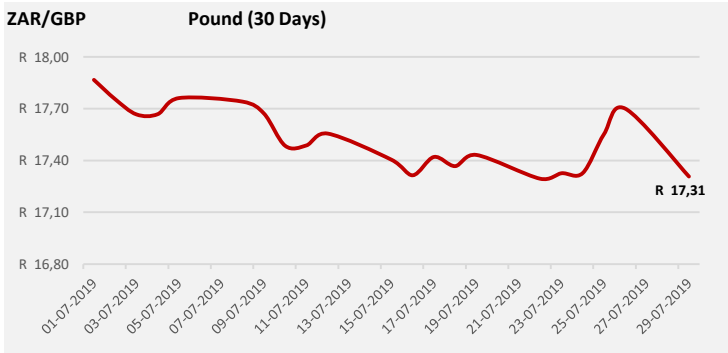
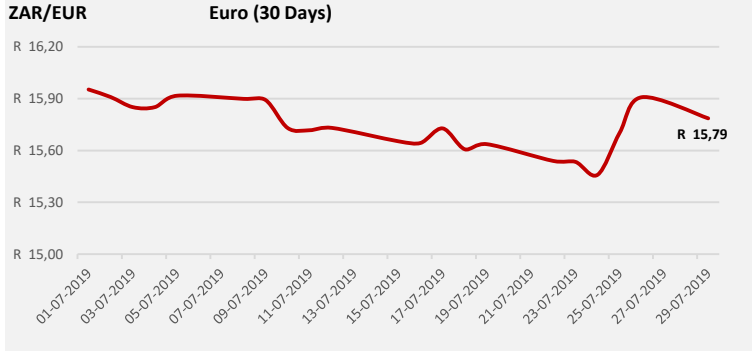
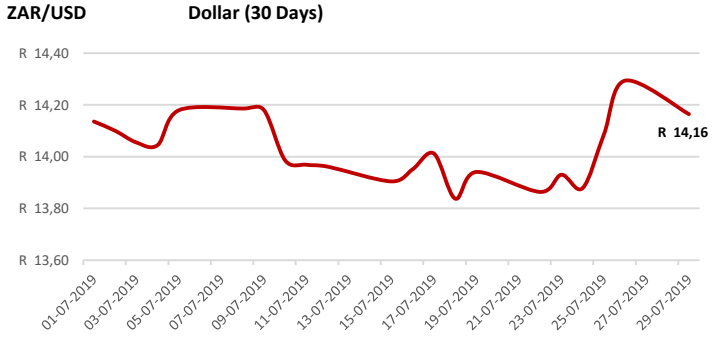
## Attribution of Daily Returns



## JSE Top 40 | Top Five Gainers and Losers Over One Day



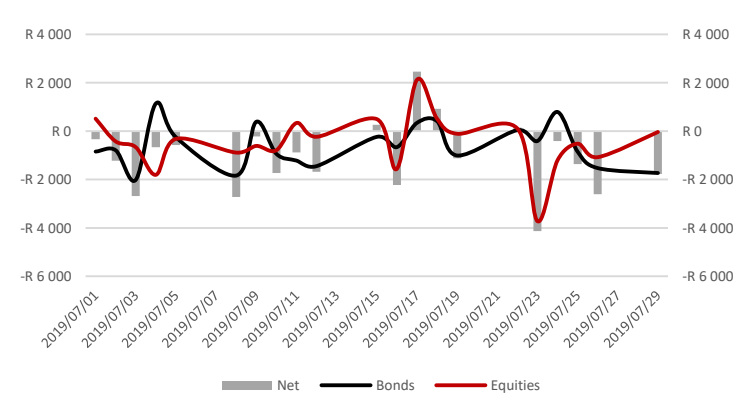
## Currency



## Commodities

	Close	Daily % Change	MTD % Change	YTD % Change
Brent Crude	63,71	0,39%	-0,96%	16,75%
Gold	1 426,80	0,56%	1,03%	11,04%
Platinum	880,65	1,82%	5,46%	10,65%
Silver	16,46	0,39%	7,36%	6,11%
Palladium	1 554,31	1,38%	0,86%	22,90%

## International Flows (Million ZAR)



\*All data as of previous working day. All data provided by Bloomberg.

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