

# DAILY GLOBAL MARKET UPDATE

09 June 2026



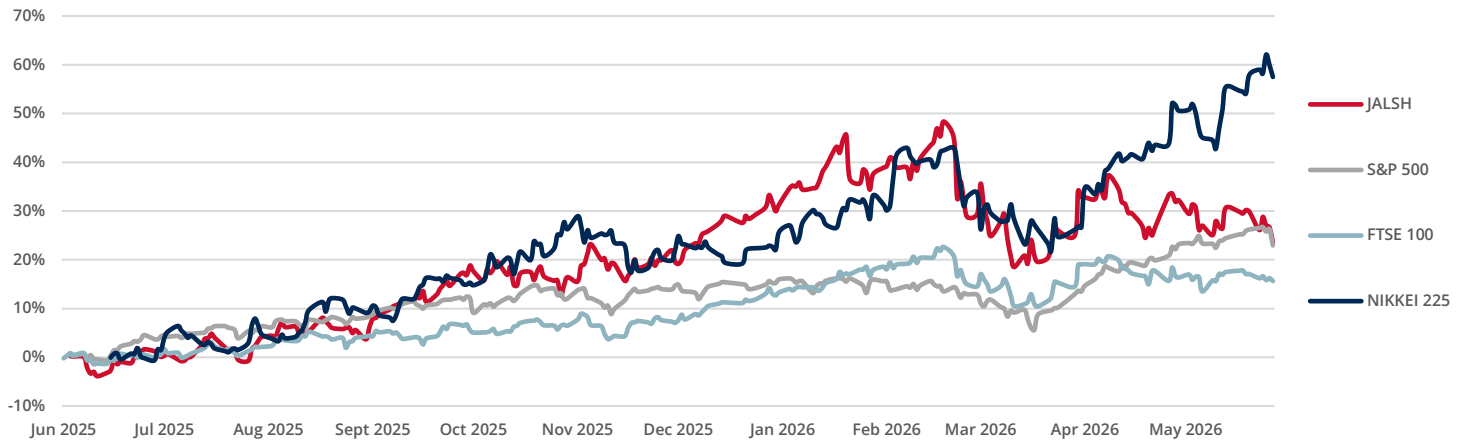
## SNAPSHOT

GBP/USD	1.33	EUR/USD	1.15	AUD/USD	0.70	USD/JPY	160.16
USD/ZAR	R 16.52	EUR/ZAR	R 19.06	GBP/ZAR	R 22.03	AUD/ZAR	R 11.64

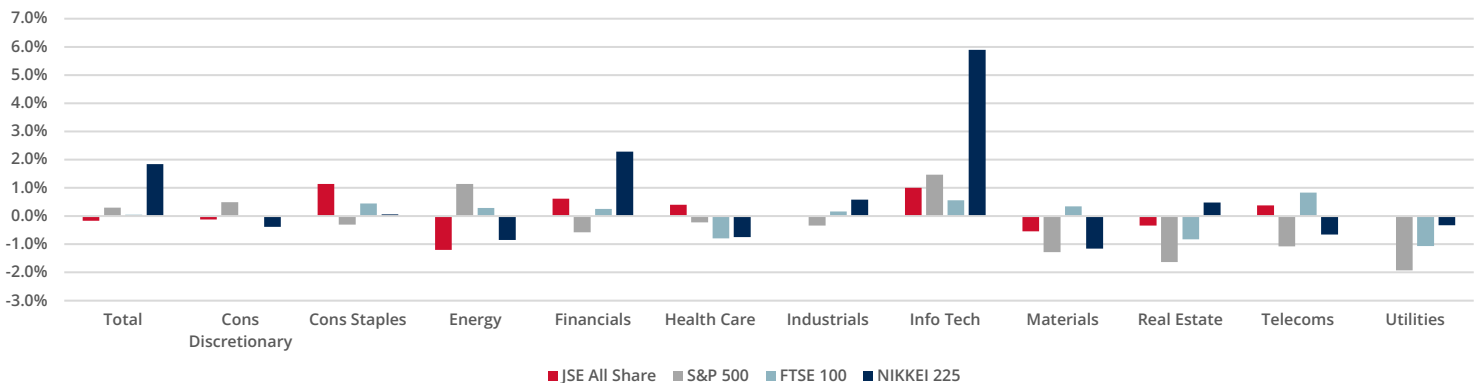
## GLOBAL INDICES

	Close	Daily % Change	MTD % Change	YTD % Change	12 MTH % Change		Close	Daily % Change	MTD % Change	YTD % Change	12 MTH % Change
MSCI World	4,756.17	0.01%	-2.23%	7.35%	21.36%	JP Morgan EMBI	1,035.49	-0.19%	-0.45%	1.73%	11.43%
MSCI Emerging Market	1,655.26	-3.61%	-5.53%	17.86%	38.66%	Bloomberg Global Aggregate	498.23	-0.21%	-1.10%	-0.61%	2.05%
<b>United States</b>						<b>Asia</b>					
S&P 500	7,405.73	0.30%	-2.30%	8.18%	23.31%	Nikkei 225	64,024.60	-3.85%	-1.70%	29.53%	71.19%
Dow Jones	50,786.01	-0.16%	-0.48%	5.66%	18.77%	S&P/ASX 200	8,625.12	-0.70%	-1.46%	-1.26%	1.04%
Nasdaq	25,929.66	0.86%	-3.87%	11.56%	32.35%	Hang Seng	24,657.06	-1.22%	-1.77%	-3.49%	2.29%
Russell 2000	2,855.42	0.77%	-2.19%	15.05%	33.15%	CSI 300	4,713.64	-2.14%	-2.16%	3.38%	23.20%
<b>Europe</b>						<b>South Africa</b>					
Stoxx Euro 50	6,062.29	0.00%	0.19%	4.68%	11.82%	All Share	111,089.90	-0.17%	-3.09%	-4.09%	15.22%
FTSE 100	10,373.20	0.05%	-0.35%	4.45%	17.45%	Africa Resource 20	113,524.50	-2.04%	-9.07%	-8.19%	48.53%
DAX 30	24,616.22	-0.58%	-1.95%	0.51%	1.83%	Africa Industrial 25	129,152.60	0.61%	1.06%	-6.78%	-5.08%
CAC 40	8,199.29	-0.23%	0.19%	0.61%	5.23%	Africa Finance 15	25,106.11	0.63%	-1.60%	0.94%	18.42%

## NORMALISED % PERFORMANCE | USD TERMS



## DAILY RETURNS



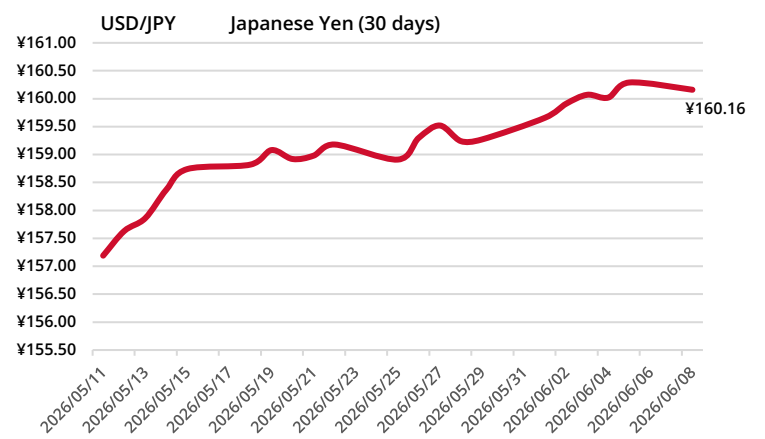
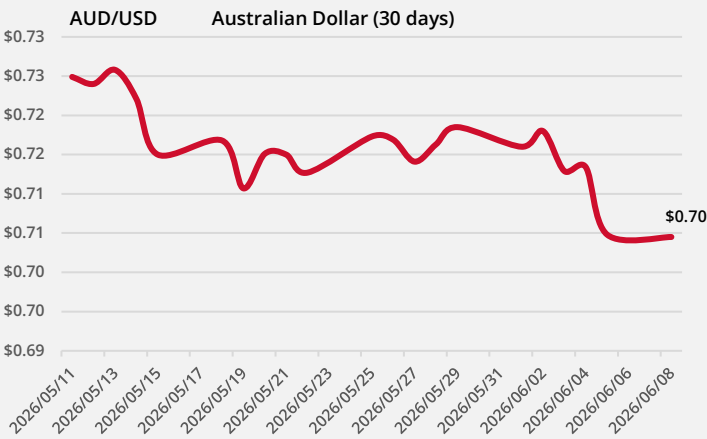
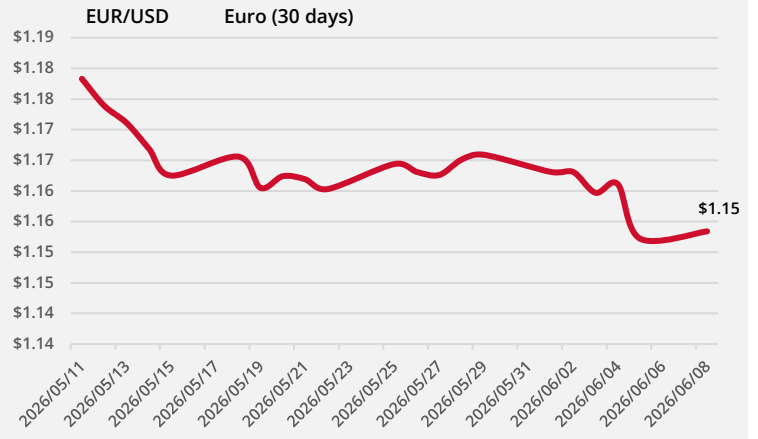
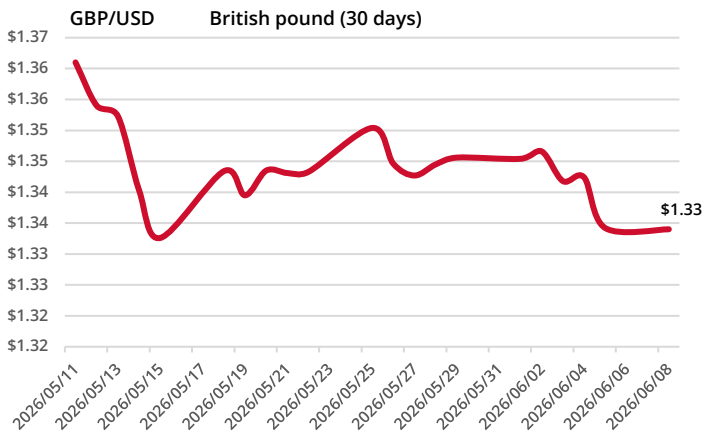
## 10 YEAR BOND YIELDS

	Yield %	1d Change	1m Change	1y Change
United States	4.56	0.03	0.11	0.07
United Kingdom	4.94	0.04	0.13	0.30
Germany	3.06	0.02	0.12	0.48
Japan	2.73	0.06	0.00	1.20
Australia	4.91	0.00	0.09	0.65
South Africa	8.90	0.02	0.32	-1.26

## GLOBAL INTEREST RATES

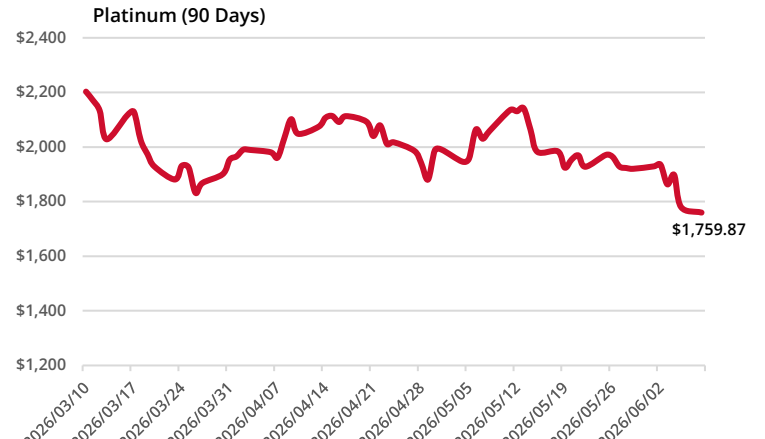
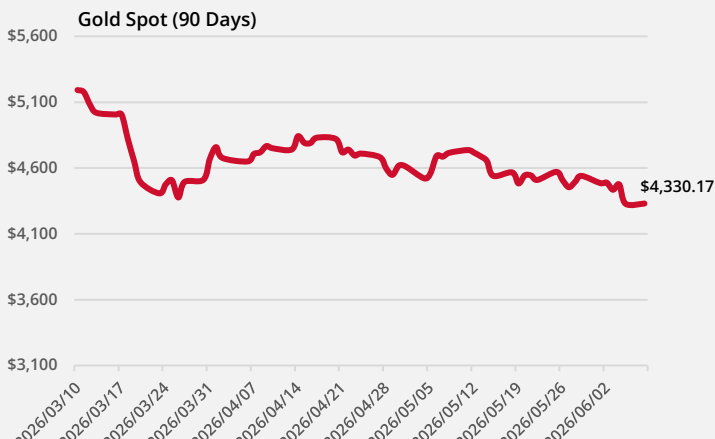
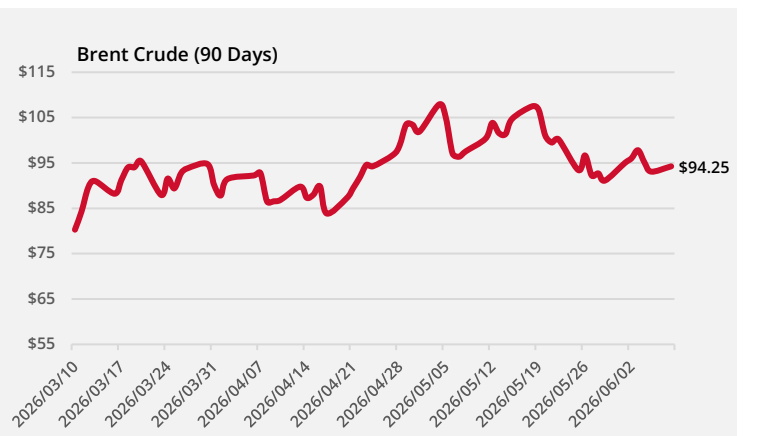
	Rate
European Central Bank Main Refinancing Rate	2.15%
United States Fed Funds Rate	3.50%-3.75%
Bank of England Rate	3.75%
Bank of Japan rate	0.75%
Reserve Bank of Australia Rate	4.35%
South Africa Repo Rate	6.75%

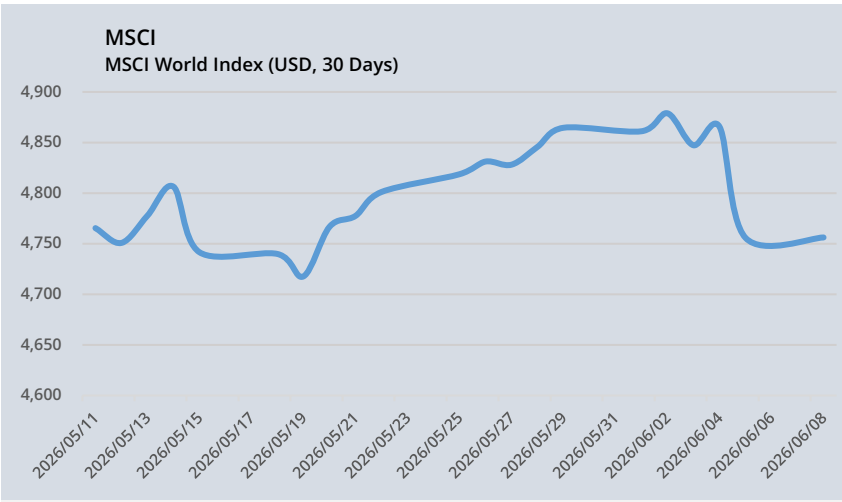
## CURRENCIES



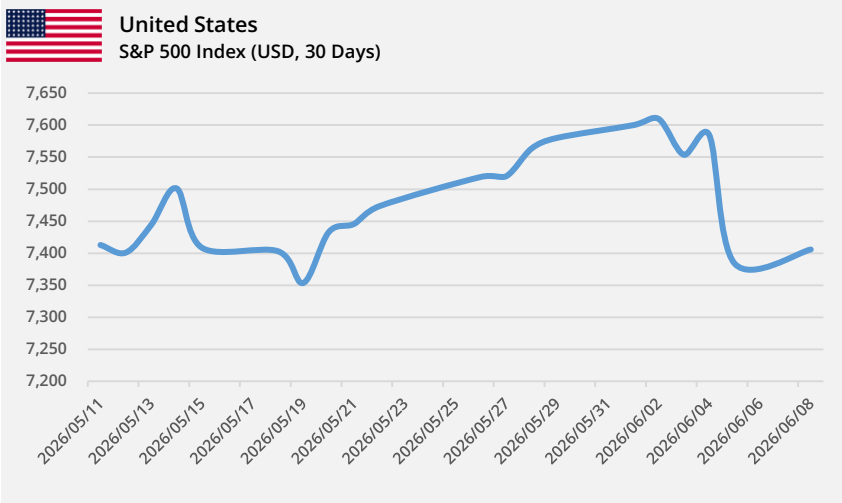
## COMMODITIES

	Close	Daily % Change	MTD % Change	YTD % Change
Brent Crude	94.25	1.25%	2.35%	54.94%
Gold	4,330.17	0.04%	-4.35%	0.54%
Platinum	1,759.87	-1.15%	-8.21%	-14.46%
Silver	68.19	0.53%	-8.98%	-4.36%
Palladium	1,218.26	-0.63%	-10.00%	-24.41%
Copper	635.00	1.04%	-0.37%	9.92%
Natural gas	3.15	-2.54%	-4.22%	-14.17%

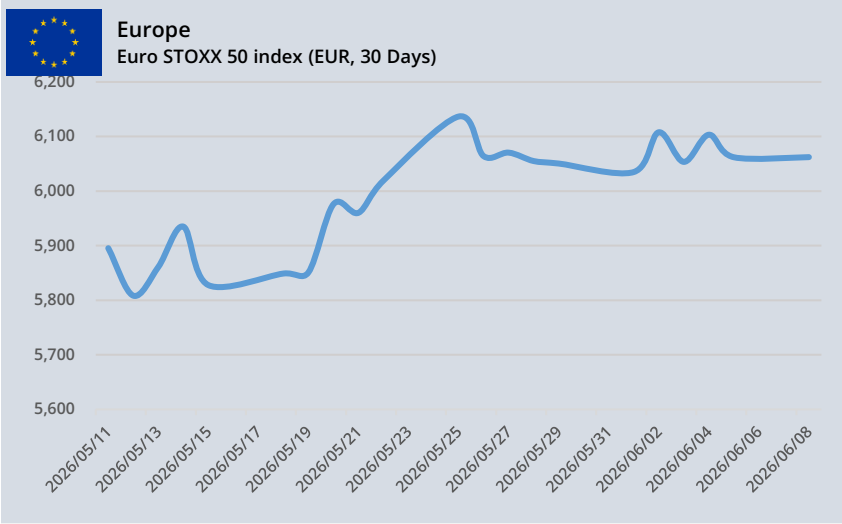




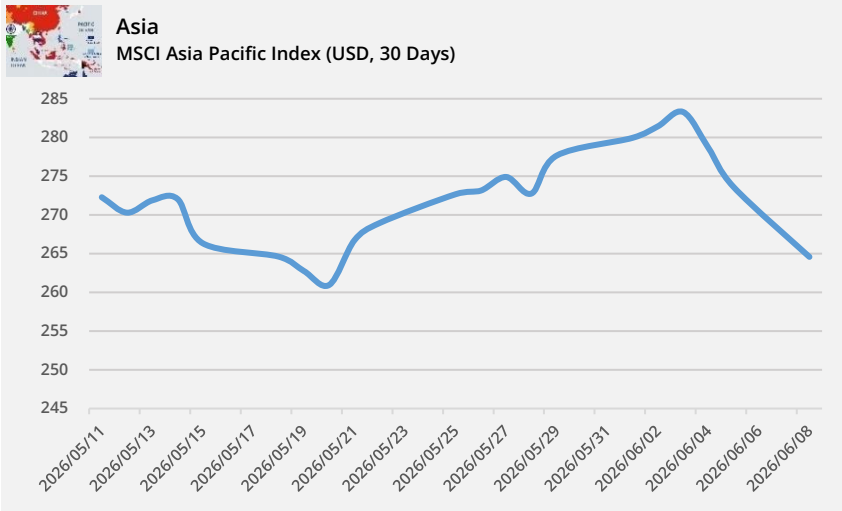
Global markets were mixed on Monday as easing tensions between Iran and Israel helped stabilise investor sentiment, supporting technology stocks on Wall Street and prompting a pullback in oil prices from earlier highs. MSCI's global equities index edged lower overall, although U.S. markets benefited from a rebound in technology shares. Investor optimism improved after Iran and Israel indicated they had paused attacks following calls from U.S. President Donald Trump for an immediate ceasefire. Despite the de-escalation, uncertainty remained. Iran warned it could resume military action if Israel continued operations against Hezbollah in Lebanon, while both sides reported strikes on energy-related infrastructure over the weekend. Oil prices remained elevated but finished well below session highs. U.S. crude settled 0.8% higher at \$91.30 per barrel after trading above \$95 earlier in the day, while Brent crude rose 1.3% to \$94.25 per barrel after briefly exceeding \$98. Gold prices were little changed. Hopes for a sustained ceasefire provided some support to the precious metal, but gains were limited by expectations that the U.S. Federal Reserve may still raise interest rates, increasing the opportunity cost of holding non-yielding assets such as gold.



U.S. markets ended mostly higher on Monday, with technology and semiconductor stocks leading gains as investors bought into the sector following Friday's sharp selloff. Investor sentiment was also supported by signs of easing tensions in the Middle East after Iran and Israel indicated they had paused attacks on each other following calls from U.S. President Donald Trump for an immediate ceasefire. The Nasdaq outperformed, while the Dow Jones Industrial Average closed slightly lower. Markets finished below their intraday highs as investors remained cautious despite the improvement in geopolitical sentiment. Technology was the best-performing sector in the S&P 500, rising 1.5%, while the Philadelphia Semiconductor Index surged 5.6%, recovering some of Friday's losses. Intel jumped 11.2% after reports that Alphabet's Google had placed an order for more than 3 million tensor processing units to be manufactured in 2028. Marvell Technology gained 9.6% after it was announced that the company would join the S&P 500 index later this month. Apple declined 1.9%, despite unveiling a range of new artificial intelligence features for Siri and other products. Investors are also closely watching the upcoming SpaceX initial public offering, which is expected to be a key test of investor appetite for high-growth technology companies.



European markets closed slightly lower on Monday but recovered from earlier losses as oil prices retreated following signs of a pause in hostilities between Iran and Israel. The pan-European STOXX 600 fell 0.2% to 621.73 points after touching a two-week low earlier in the session. The main corporate focus was in Italy's banking sector. Monte dei Paschi di Siena surged 13% after Intesa Sanpaolo launched a €30.6 billion unsolicited cash-and-share takeover offer for the lender, potentially creating one of Italy's largest banking deals. Intesa shares fell 1.4%, while Banco BPM, which had previously proposed a merger with Monte dei Paschi, traded slightly higher. Technology stocks provided support to the broader market as investors returned to the sector following a sharp selloff in U.S. technology shares late last week. The European technology index rose 1.3%, making it the best-performing sector of the day.

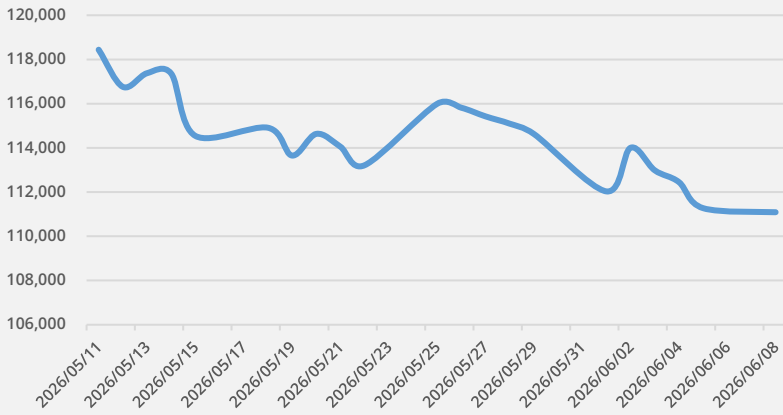


Asian markets rebounded strongly on Tuesday after Israel and Iran signalled a pause in hostilities, easing geopolitical concerns and reducing pressure on oil prices. South Korea's market led gains, rising 7% after falling more than 8% in the previous session as investors returned to semiconductor stocks following the recent selloff. Japan's Nikkei gained 2.1%, recovering part of Monday's 3.9% decline. MSCI's broadest index of Asia-Pacific shares outside Japan rose 3.0%, reflecting improved risk appetite across the region. Chinese equities also advanced, with the CSI 300 gaining 0.9% after stronger-than-expected trade data. Exports rose 19% year-on-year in May, while imports increased 27%, both exceeding market forecasts. The trade figures highlighted China's ability to find alternative export markets despite ongoing U.S. tariffs and trade restrictions, although domestic demand remains relatively weak.

## SOUTH AFRICA

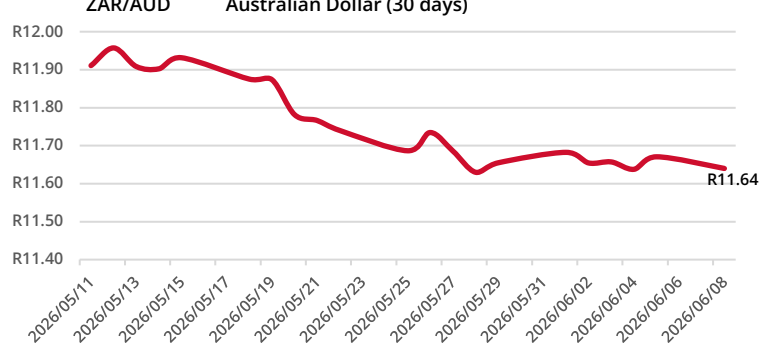
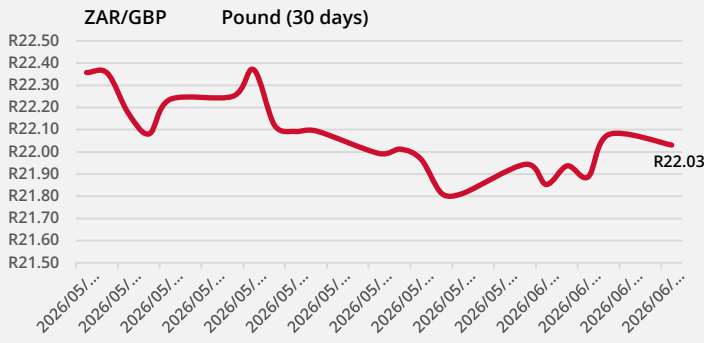
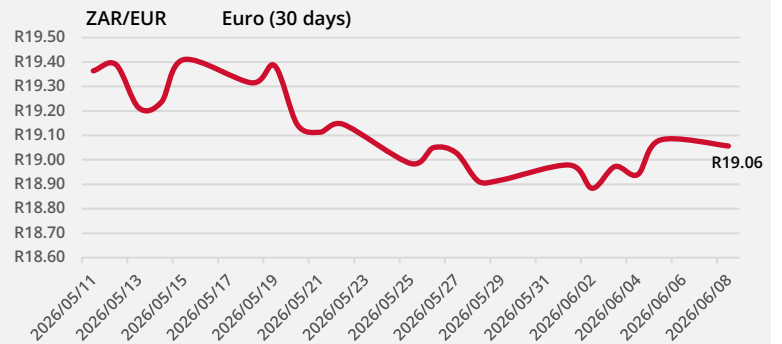
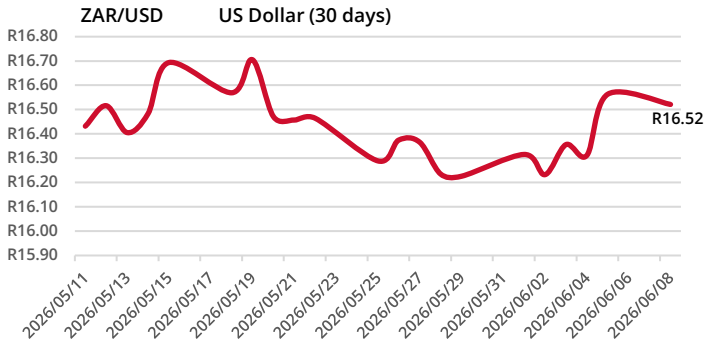


**South Africa**  
JSE All Share Index (ZAR, 30 Days)

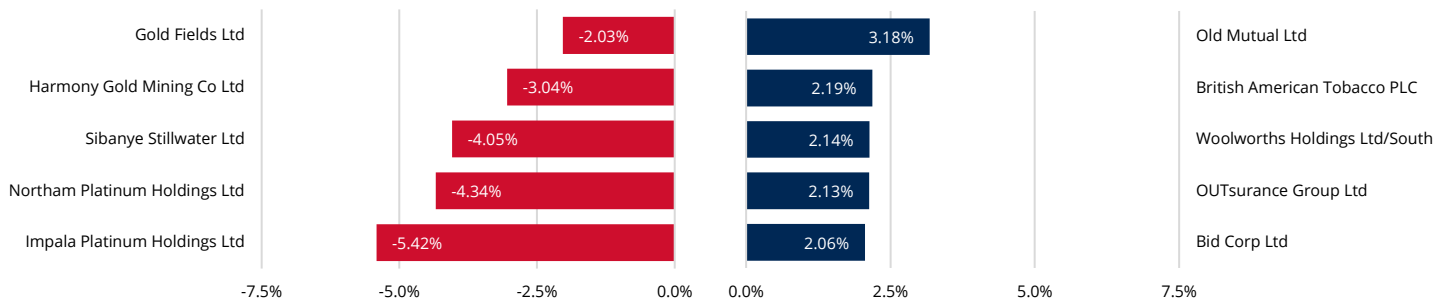


South African markets closed in the red yesterday, weighed down by losses in mining sector stocks. The rand strengthened, recovering earlier losses after Iran announced that its latest military operation against Israel had concluded, easing some geopolitical concerns and improving sentiment toward risk-sensitive currencies. Iran's military said its first wave of attacks on Israel since the April ceasefire had ended, although it warned that further action could follow if Israel continued operations in Lebanon. Like many emerging market currencies, the rand remains highly sensitive to global risk sentiment and has been influenced by developments in the Middle East conflict since tensions escalated earlier this year. Investor attention now turns to a busy week of domestic economic data. South Africa will release first-quarter GDP figures on Tuesday, followed by current account, mining production, and manufacturing output data on Thursday, which will provide further insight into the health of the local economy.

## CURRENCIES



## JSE TOP 40 | TOP FIVE GAINERS AND LOSERS



## THE WEEK AHEAD

- **June 9:** SA GDP (YoY (Q1))
- **June 10:** U.S. CPI (YoY) (May)
- **June 11:** ECB Interest Rate Decision (Jun)