

Daily Market Pulse

* Creativity + Wisdom = Innovation

Thursday, 02 September 2010

TOP40 GAINERS		
	Close	% Move
ANGLOGOLD AS	31,401	1.82
HARMONY GOLD	7,587	1.58
AFRICAN RAIN	16,400	1.23
MONDI PLC	5,552	0.96
ASPEN PHARMA	8,695	0.89
TOP40 LOSERS		
	Close	% Move
SABMILLER PL	21,325	-2.15
SASOL LTD	28,360	-1.9
FIRSTRAND LT	1,981	-1.64
LONMIN PLC	17,630	-1.51
BHP BILLITON	21,191	-1.48
TOP40 VOLUME LEADERS		
	Close	Volume
OLD MUTUAL P	1,500	19.40MLN
RICHEMONT-DR	2,969	11.10MLN
FIRSTRAND LT	1,981	11.03MLN
MTN GROUP LT	12,225	7.91MLN
SHOPRITE HLD	9,150	5.39MLN
INDICES		
	Close	% Move
ALSI	27,841	-0.49
TOP40	24,718	-0.57
FINI 15	7,869	-0.35
INDI 25	27,841	-0.67
RESI 20	27,841	-0.57
CURRENCIES		
	Close	% Move
R/\$	7.23	0.98
€/£	1.28	0.10
R/€	9.27	0.88
\$/¥	84.17	0.32
R/£	11.13	1.35
COMMODITY PRICES		
	Close	% Move
Gold	1,252	0.62
Platinum	1,548	0.83
Palladium	523	0.91
Brent Crude	75	-1.30
LME Copper (spot)	7,541	2.52
EUROPEAN MARKETS		
	Close	% Move
FTSE 100	5,375	0.16
CAC 40	3,636	0.34
DAX	6,089	0.09
Swiss	6,335	0.04
Euro Stoxx50	2,719	0.13
US MARKETS		
	Close	% Move
Dow Jones	10,258	-0.11
S&P 500	1,083	0.27
Nasdaq	1,829	0.49

LOCAL MARKETS

After three consecutive days of positive close the All Share had a volatile day, traded sideways around the flat levels and closed at the day's worst levels. Volumes were very slow in the 1st half as the market awaited US data as well as the ECB interest rate announcement. Total value was R11.3b. Futures market was also very volatile traded in both positive and negative territory, although fell in the negative at our close in line with the broader markets.

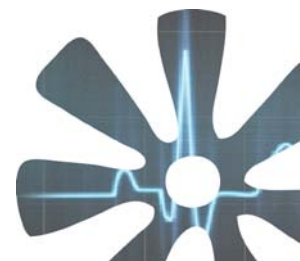
Gold miners were the major gainers as the Gold price was higher boosted by disappointing data from the US, followed by Platinum miners and on the downside were Oil & Gas producers as well as Coal Miners.

SA vehicle sales came out better than expected at 36% as low interest rates spurred consumer spending. The rand was very strong, traded between a range 7.22 and 7.33. Gold price rose as the market was disappointed by the slightly worse than expected US data and the weaker dollar.

INTERNATIONAL MARKETS

Asian markets closed firm in the positive terrain as the market absorbed good manufacturing data from the US. The Nikkei finished 1.5% higher, Hang Seng Index rose 1.2%, while Shanghai Composite Index advanced 1.3%. Australia's S&P/ASX gained 0.8%. European equities edged lower after the previous session's rally, closed around the flat levels. ECB kept rates unchanged at 1%.

US stocks were also flat at open, as investors responded to reports on jobless claims and retail sales, bounced back on better than expected sales from major U.S. retailers and a rise in pending home sales and slid again to the flat levels.



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