

DAILY MARKET COMMENTARY



[Fixed Income and Interest Rates](#) | [Currencies](#) | [Commodities](#) | [Equities](#) | [LDT](#)
[JSE Performance](#) | [Economics](#) | [*Foreign Flows](#) | [Economic Calendar](#) | [Contacts](#)

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(* when available)

Key Daily Drivers

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SNIPPETS

Currencies	Rand fails to consolidate gains sub 16.5000
Commodities	Oil prices slipped for a fourth straight day; Gold inched lower
Equities	Yesterday, we pretty much saw a reversal of the “sell SA Inc. vs PGMs” theme that dominated last week’s flows

Key Overnight Factors and Upcoming Events This Week

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Date	Region	Event	Actual/Expected/Prior	Implications
21/10	UK	CPI	--/0.6%/0.2%	CPI to accelerate to 0.6% in September at the back of government stimulus packages
22/10	US	Initial Jobless Claims	--/865k/898k	Jobless claims to come in at 865k, down from 898k in the prior week
23/10	UK	Retail Sales	--/3.7%/2.8%	Consumers remain cautious at the back of fears for a second wave of covid-19 infections and prospects for higher unemployment

Source: Nedbank

Contact For Queries
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Fixed Income and Interest Rates

Bond flow sales | +2711 535 4021 | Corporate Money Markets | +2711 535 4007 | Business Bank Money Markets | +2711 535 4006

Bonds	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
R208-0,4 yrs	3,43	-0,00	-13,90	-330,80	-321,10	↓
R186-6,2 yrs	7,01	-0,05	-19,15	-123,35	-122,15	↓
R2030-9,3 yrs	9,25	-0,05	-16,75	23,35	32,95	↓
R2048-27,4 yrs	11,60	-0,05	4,65	151,85	175,55	↑
US 10 yr	0,77	-0,41	8,17	-115,27	-98,89	↑
UK 10 yr	0,17	-1,30	-6,00	-65,30	-54,00	↓
German 10 yr	-0,63	-0,60	-10,60	-44,30	-24,60	↓
Japan 10 yr	0,02	-0,60	0,40	3,10	15,10	↑

Money Market	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
SA repo rate	3,50	0,00	0,00	-300,00	-300,00	→
SA prime rate	7,00	0,00	0,00	-300,00	-300,00	→
SA CPI (MTD - previous month)	3,10		-10,00	-90,00	-120,00	↓
SA 3m JIBAR	3,34	-0,80	-0,80	-345,80	-343,30	↓
SA 3m NCD	3,35	0,00	0,00	-347,50	-342,50	→
SA 6m NCD	3,36	0,00	-6,25	-396,25	-386,25	↓
SA 12m NCD	3,48	0,00	-11,25	-415,00	-412,50	↓
US 3m LIBOR	0,22	0,06	-1,55	-169,00	-178,49	↓
UK 3m LIBOR	0,05	0,01	-1,50	-74,58	-73,78	↓
Japan 3m LIBOR	-0,10	-0,18	0,05	-5,60	0,55	↑

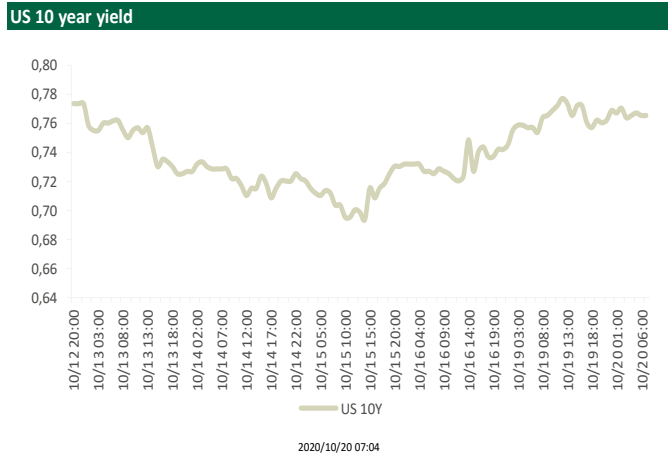
Source: Bloomberg & Nedbank CIB Time 2020/10/20 07:04

FRAs and Swaps	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
3X6 FRA	3,10	-0,50	-16,50	-351,00	-348,00	↓
6X9 FRA	3,03	0,00	4,00	3,00	4,00	↑
9X12 FRA	3,10	0,00	-26,50	-339,00	-333,00	↓
18X21 FRA	3,59	0,00	-30,50	-299,00	-296,00	↓
SA 2yr Swap	3,31	0,00	-25,00	-328,00	-324,00	↓
SA 3yr Swap	3,76	0,00	-22,00	-291,00	-288,00	↓
SA 5yr Swap	4,85	0,00	-12,75	-210,50	-206,00	↓
SA 10yr Swap	7,00	-0,20	-4,00	-68,00	-61,50	↓
SA 15yr Swap	7,93	-4,50	3,50	-13,50	-3,50	↑

Spreads	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
2v10y	-3,70	0,20	-21,00	-260,00	-262,50	↓
3v10y	-3,24	0,20	-18,00	-223,00	-226,50	↓
R2030-R208	5,82	-0,05	-2,85	354,15	354,05	↓
R2048-R2030	2,34	-0,00	21,40	128,50	142,60	↑
5y-R2030	-4,41	0,05	4,00	-233,85	-238,95	↑
10y-R2030	-2,25	-0,15	12,75	-91,35	-94,45	↑
15y-R2030	-1,33	-4,45	20,25	-36,85	-36,45	↑
SA 5yr CDS spread - basis points	273,00	0,00	-45,00	106,50	93,50	↓

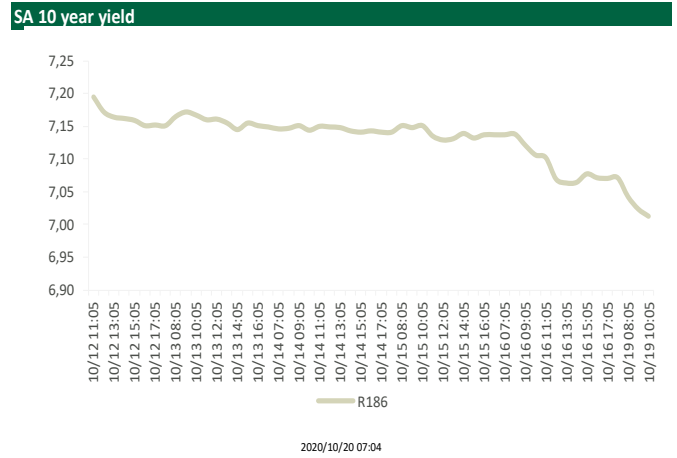
Source: Bloomberg & Nedbank CIB Time 2020/10/20 07:04

US 10 Year Yield



Source: Bloomberg, Nedbank

SA 10 Year Yield



Source: Bloomberg, Nedbank

Currencies

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- The new week got underway with the rand trading in the low 16.50s. In what proved to be an exceptionally sedate session, the local unit managed to post marginal gains for the majority of the session. The rand reached a best level of 16.4250, despite some demand for the USD emerging at the sub-16.5000 level, and ended the local session at 16.4600. In the overnight trading sessions, the rand came under some pressure as emerging markets lost ground amid concerns regarding the stimulus talks in the US, which saw the USD recover marginally. This morning, the USDZAR is currently trading at 16.5500. The EURZAR is trading at 19.4905 and the GBPZAR at 21.4230.
- The international markets saw the major currency pairs post gains relative to the USD, with the EURUSD reaching a high of 1.1793 on the day. It has drifted back marginally from those highs this morning and is currently trading at 1.1780. The GBPUSD traded to a high of 1.3024, although failing to consolidate the gains above 1.3000. It is currently trading at 1.2945 this morning. Gold has held steady above the 1,900.00 level, although it lost ground from the close last night; it currently trades at 1,902.65.
- Data releases scheduled for today: locally, we have the leading index; from Europe, we have the German PPI and current account for the zone; and from the US, we have housing starts and building permits.
- The markets have continued to trade cautiously and within relatively limited ranges as they await a stimulus deal in the US, given the house speaker has set a deadline to reach a deal. Local activity has continued to disappoint the markets apparently cautious of government to deliver on the economic stimulus plan.
- Possible trading range for the rand today: 16.3500 to 16.8500

Majors	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	USD trend
GBPUSD	1.29	-0.02	0.20	-2.35	-0.11	↑	USD weakness
EURUSD	1.18	0.08	0.49	5.04	5.63	↑	USD weakness
USDJPY	105.52	0.09	0.04	2.93	-2.94	↑	USD strength
USDAUD	1.42	0.35	1.69	-0.38	-2.49	↑	USD strength

Rand crosses	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	ZAR trend
USDZAR	16.55	0.16	-1.23	15.39	10.80	↓	ZAR strength
GBPZAR	21.42	0.14	-1.10	13.33	10.69	↓	ZAR strength
EURZAR	19.49	0.22	-0.71	19.44	15.55	↓	ZAR strength
AUDZAR	11.65	-0.17	-2.96	15.56	13.01	↓	ZAR strength
ZARJPY	6.38	-0.04	1.17	-21.58	-15.36	↑	ZAR strength

African FX	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	ZAR trend
ZARMWK (Malawian kwacha)	45.61	-0.37	1.78	-15.53	-8.67	↑	ZAR strength
ZARWBP (Botswana pula)	0.69	-0.16	0.20	-9.39	-6.47	↑	ZAR strength
ZARKES (Kenyan shilling)	6.60	-0.15	1.56	-9.58	-6.16	↑	ZAR strength
ZARMUR (Mauritian rupee)	2.42	-0.20	1.56	-7.44	-1.63	↑	ZAR strength
ZARNGN (Nigerian naira)	23.16	0.49	1.76	-12.46	-5.73	↑	ZAR strength
ZARGHS (Ghanian cedi)	0.35	-0.14	1.68	-15.84	-5.97	↑	ZAR strength
ZARZMW (Zambian kwacha)	1.25	-0.17	4.69	20.14	28.66	↑	ZAR strength
ZARMZN (Mozambican metical)	4.40	-0.15	1.97	-0.00	4.23	↑	ZAR strength

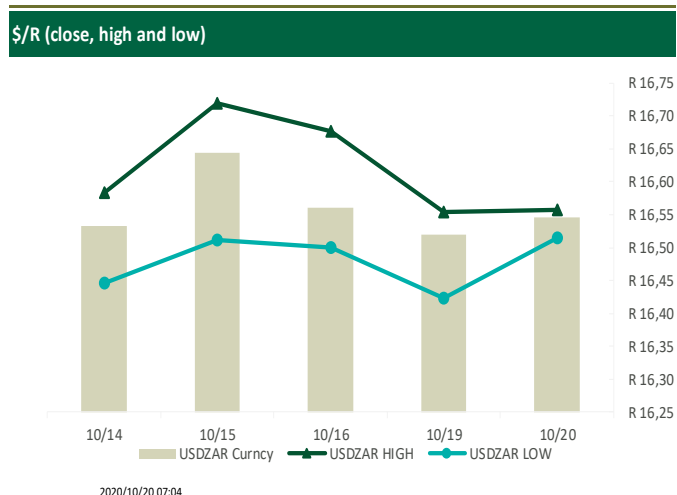
Emerging Market FX	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	USD trend
USDBRL (Brazilian Real)	5.61	-0.64	0.02	28.16	26.39	↑	USD strength
USDTRY (Turkish Lira)	7.88	-0.02	2.11	24.50	25.68	↑	USD strength
USDMXN (Mexican Peso)	21.22	0.13	-4.20	10.82	9.88	↓	USD weakness
USDINR (Indian Rupee)	73.37	0.00	-0.54	2.71	3.03	↓	USD weakness
USDRUB (Russian Ruble)	77.66	-0.32	0.04	20.18	17.94	↑	USD strength

Source: Bloomberg & Nedbank CIB

Time 2020/10/20 07:04

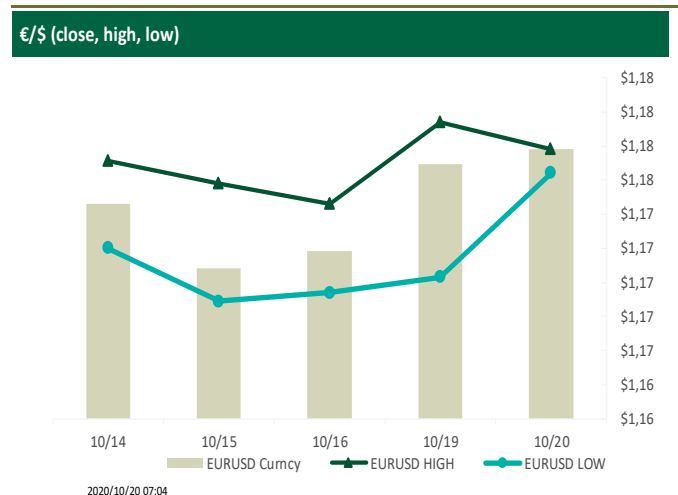
*Please note that the sign on the % change reflects the change on the headline number. The narrative indicates the trend direction over the month. For trade in any of these currencies, contact our FX dealing desks

USD/ZAR



Source: Bloomberg, Nedbank

EUR/USD



Source: Bloomberg, Nedbank

Commodities

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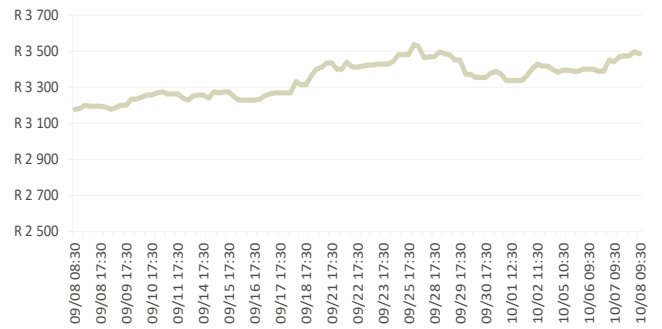
- Oil prices slipped for a fourth straight day on worries about a resurgence of coronavirus cases globally stifling a promising recovery in fuel demand, while growing output from Libya adds to plentiful supply in the market.
- Gold inched lower as caution set in ahead of the deadline to reach an agreement on a new U.S. coronavirus stimulus, base metals mixed.

Commodities	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend
Brent near future (\$)	42,26	-0,84	3,20	-35,97	-28,88	↑
WTI crude (\$)	40,57	-0,64	0,87	-33,56	-24,56	↑
Gold spot (\$)	1 902,19	-0,10	0,87	25,37	28,14	↑
Platinum spot (\$)	858,67	-0,17	-3,87	-11,16	-3,37	↓
SA white maize spot (R)	3 714,00	0,90	10,80	42,85	25,09	↑

Source: Bloomberg & Nedbank CIB
Time: 2020/10/20 07:04

SA White Maize

SA White maize (ZAR/MT) - 30 day chart

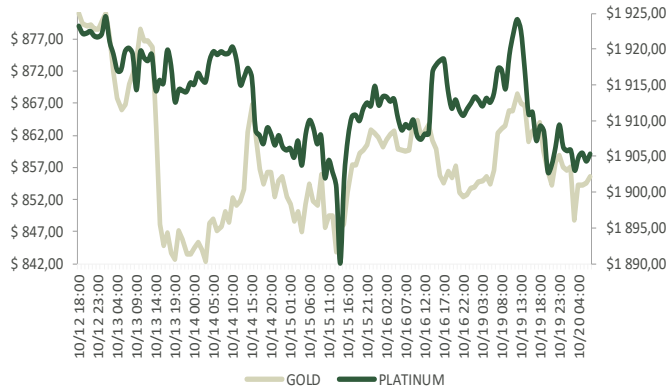


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Source: Bloomberg, Nedbank

Platinum vs. Gold

Platinum vs. Gold

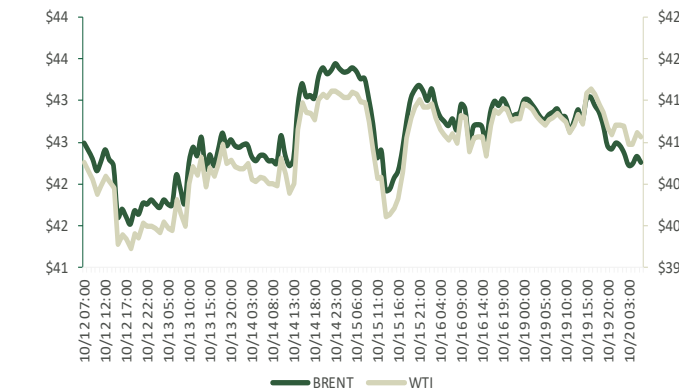


2020/10/20 07:04

Source: Bloomberg, Nedbank

Brent Crude vs. West Texas Intermediate

Brent Crude vs West Texas Intermediate



2020/10/20 07:04

Source: Bloomberg, Nedbank

Equities

Cash equities | +2711 535 4030/31

South Africa

- JALSH +0.1%. In another lacklustre showing on the volume front, we pretty much saw a reversal of the “sell SA Inc. vs PGMs” theme that dominated last week’s flows. Banks +4.2%; saw some bottom fishing from locals and there was an element of switching out of resources. OMN +1.8%; has reached an agreement to sell its share in Oro Agri to Rovensa for USD146.9m. Proceeds will be used to repay existing core term debt, which will reduce the group’s interest expenses, as well as its weighted average cost of debt going forward. The group will also unwind existing interest rate hedges where appropriate. The company has received support from an effective 59.8% of shareholders for the deal.

UK/Europe

- European stocks erased gains to close lower as lingering coronavirus concerns offset resurfaced hopes of a US stimulus deal. The Stoxx Europe 600 dropped 0.3%, with 13 industry groups in the red. Chemicals (-1.2%) and healthcare (-0.9%) stocks declined, with large-cap pharma stocks weighing on the latter; financial sectors were the best performers led by financial services (+1%). Euro Stoxx 50 down 0.3%, FTSE 100 down 0.6%, DAX down 0.4%, CAC 40 down 0.2%, FTSE MIB down 0.1%, IBEX 35 up 0.2%, AEX Index down 0.6% and Swiss Market Index down 0.2%.

USA

- Stocks fell sharply on Monday ahead of a key deadline set by House Speaker Nancy Pelosi to reach a deal on a new coronavirus stimulus bill before the elections while COVID-19 cases rise. Shares of big tech stocks contributed to the decline. The Dow closed 410.89 points lower at 28,195.42. Earlier in the day, the 30-stock average was up more than 100 points. The S&P dropped 1.63% to close at 3,426.92, energy and tech were the worst-performing sectors and the Nasdaq pulled back 1.65% to 11,478.88. The Russell 2000 gave up 20.18 points to 1,613.63 and VIX was up 6.46% to 29.18.

Asia

- S&P futures climbed after a spokesman for House Speaker Nancy Pelosi said differences were narrowing in talks. Shares dipped in Japan, Australia and South Korea and fluctuated in Hong Kong. The 10-year Treasury steadied around 0.77% and the USD held losses versus major peers. The PBoC set yuan fixing at 6.6930 vs. 6.7010 on 19 October.

Developed Markets	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2019 Performance	MTD trend
Dow Jones	28 195,42	-1,44	1,49	-1,20	5,32	22,34	↑
Nasdaq	11 478,88	-1,65	2,79	27,93	41,90	35,23	↑
S&P 500	3 426,92	-1,63	1,90	6,07	14,76	28,88	↑
DJ Eurostoxx 50	3 242,51	-0,09	1,53	-13,42	-9,41	25,12	↑
DAX	12 854,66	-0,42	0,74	-2,98	1,75	25,22	↑
CAC	4 929,27	-0,13	2,62	-17,54	-12,54	26,46	↑
FTSE	5 884,65	-0,59	0,32	-21,98	-17,70	12,00	↑
ASX200	6 185,80	-0,70	6,36	-7,45	-6,98	13,38	↑
Nikkei 225	23 543,58	-0,54	1,55	-0,48	4,67	20,93	↑
MSCI World	2 417,69	-0,92	2,13	2,51	10,13	25,19	↑

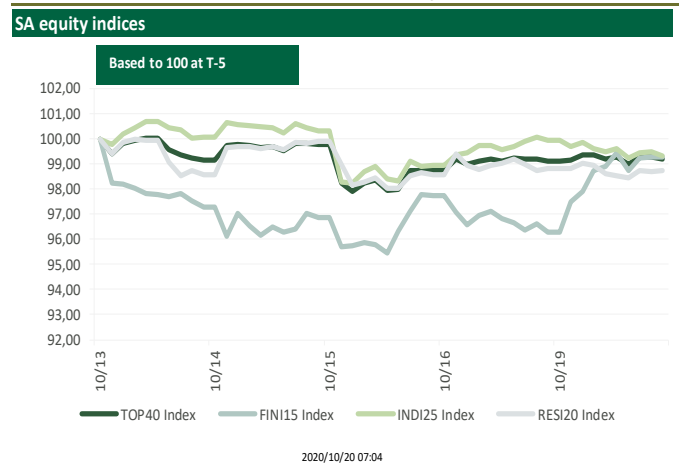
Emerging Markets	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2019 Performance	MTD trend
Hang Seng	24 520,34	-0,09	4,52	-13,02	-8,23	9,07	↑
Shanghai	3 308,31	-0,13	2,80	8,46	12,60	23,72	↑
Brazil Bovespa	98 657,70	0,35	4,29	-14,69	-5,80	27,07	↑
India - NSE	40 560,73	0,32	6,55	-1,68	3,21	14,38	↑
Russia Micex	2 794,27	-0,19	-3,84	-8,26	1,50	28,21	↓
MSCI Emerging	1 127,28	0,28	4,18	1,13	10,08	15,38	↑

SA Indices	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2019 Performance	MTD trend
JSE All Share	55 161,03	0,21	1,65	-3,37	-1,01	8,24	↑
Top 40	50 741,94	0,09	1,40	-0,15	2,49	8,75	↑
Resi 10	54 129,95	-0,07	1,40	9,89	22,45	20,01	↑
Indi 25	74 762,95	-0,61	2,15	7,88	7,09	8,82	↑
Fin1 15	9 977,80	-3,10	-0,93	-36,35	-37,79	-4,30	↓

Source: Bloomberg & Nedbank CIB

Time: 2020/10/20 07:04

Short Term Performance of SA Equity Indices



Source: Bloomberg, Nedbank

Last Day To Trade

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SHARE CODE	SHARE NAME	DIVIDEND / INTEREST RATE
20 October 2020		
BCF	Bowler Metcalf Ltd	dividend @ 29.50cps
FVT	Fairvest Property Holdings	dividend @ 9.8830cps
HET	Heriot REIT Limited	dividend @ 43.45cps
PRX	Prosus N.V	dividend @ 0.11Eur
TLM	Telemaster Holdings Ltd	dividend @ 1.60cps

Source: JSE

JSE Performance

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Top40 constituents	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2019 Performance	MTD trend
ABG : Absa Group Ltd	91,49	4,68	2,43	-38,72	-42,13	-7,74	↑
AGL : Anglo American Plc	423,60	1,45	4,00	6,21	16,89	23,76	↑
AMS : Anglo American Platinum Ltd	1 375,00	0,41	18,22	7,49	30,67	143,03	↑
ANG : Anglogold Ashanti Ltd	443,27	-0,37	2,35	40,05	44,53	74,14	↑
APN : Aspen Pharmacare Holdings Lt	109,45	-0,86	-8,24	-8,19	6,88	-11,57	↓
BHP : Bhp Group Plc	349,02	-0,56	-2,78	5,83	14,00	8,56	↓
BID : Bid Corp Ltd	231,06	0,26	-10,54	-30,03	-30,72	24,61	↓
BTI : British American Tobacco Plc	558,00	-0,63	-5,67	-6,59	9,46	27,29	↓
BVT : Bidvest Group Ltd	132,71	0,65	-3,91	-35,19	-35,42	-1,01	↓
CFR : Financiere Richemont-Dep Rec	112,83	-0,81	0,45	3,01	2,91	16,96	↑
CLS : Clicks Group Ltd	220,61	-1,51	-0,77	-14,02	-9,76	34,02	↓
CPI : Capitec Bank Holdings Ltd	1 097,56	1,49	5,80	-24,11	-18,71	29,35	↑
DSY : Discovery Ltd	122,55	0,34	-4,20	1,59	-0,10	-24,51	↓
EXX : Exxaro Resources Ltd	130,00	0,86	4,43	-0,87	8,68	-4,88	↑
FSR : Firststrand Ltd	39,52	5,39	-4,15	-37,07	-40,11	-4,21	↓
GFI : Gold Fields Ltd	203,17	-1,10	-0,05	111,92	145,70	94,30	↓
GRT : Growthpoint Properties Ltd	11,49	2,59	-6,20	-48,03	-49,47	-5,11	↓
HAR : Harmony Gold Mining Co Ltd	93,95	-1,05	5,40	83,50	100,06	103,17	↑
IMP : Impala Platinum Holdings Ltd	170,00	0,48	16,86	18,45	65,81	291,28	↑
INL : Investec Ltd	32,73	-0,73	3,74	-44,47	-44,75	5,01	↑
INP : Investec Plc	32,49	-0,79	4,74	-50,57	-51,04	2,89	↑
MCG : Multichoice Group Ltd	123,82	1,55	27,82	6,28	4,49		↑
MNP : Mondi Plc	342,04	-0,62	-3,79	4,83	16,84	7,31	↓
MRP : Mr Price Group Ltd	130,99	-0,43	-0,77	-28,22	-17,54	-25,86	↓
MTN : Mtn Group Ltd	55,24	-0,43	-1,60	-33,03	-41,01	-7,31	↓
NED : Nedbank Group Ltd	100,00	4,05	-0,76	-53,34	-58,15	-21,99	↓
NHM : Northam Platinum Ltd	186,28	0,62	9,42	50,69	86,60	185,76	↑
NPN : Naspers Ltd-N Shs	3 109,99	-0,82	5,07	35,76	35,26	19,65	↑
NRP : Nepi Rockcastle Plc	66,64	1,62	-3,42	-43,87	-45,70	9,58	↓
OMU : Old Mutual Ltd	10,31	4,67	-0,48	-47,56	-48,99	-12,23	↓
PRX : Prosus Nv	1 612,00	-0,42	4,55	52,94	46,97		↑
REM : Remgro Ltd	92,53	3,62	-1,58	-35,09	-27,20	0,13	↓
RNI : Reinet Investments Sca	272,89	0,05	-6,06	-1,66	2,14	27,03	↓
SBK : Standard Bank Group Ltd	110,42	5,38	2,20	-34,40	-38,38	-5,87	↑
SHP : Shoprite Holdings Ltd	136,74	-0,98	0,07	8,59	4,00	-33,78	↑
SLM : Sanlam Ltd	50,00	-0,77	-3,83	-36,79	-37,23	-0,88	↓
SOL : Sasol Ltd	106,00	0,57	-18,19	-65,07	-62,30	-28,59	↓
SPP : Spar Group Limited/The	179,94	-1,13	-5,12	-8,90	-6,50	-4,81	↓
SSW : Sibanye Stillwater Ltd	50,44	-2,17	8,89	40,54	95,43	258,18	↑
VOD : Vodacom Group Ltd	122,58	-0,80	-0,56	6,31	-2,06	-12,65	↓
WHL : Woolworths Holdings Ltd	35,30	0,34	0,14	-27,37	-36,68	-11,78	↑

Source: Bloomberg & Nedbank CIB

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Foreign Flows

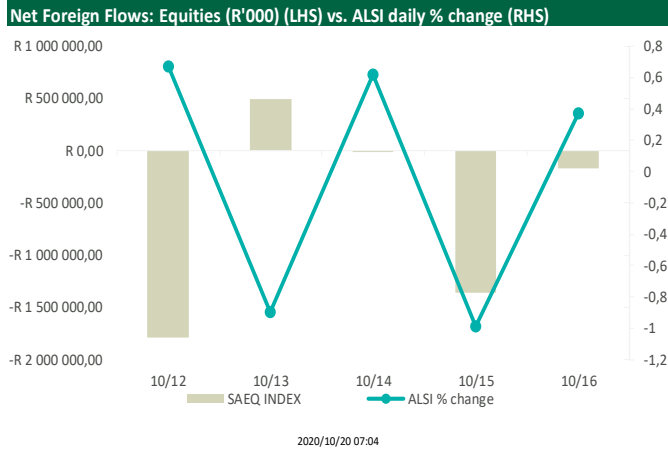
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Foreign flows (bn)	Week to 16 Oct 2020	Month to 16 Oct 2020	Year to 16 Oct 2020
Foreign flows into SA equity market	-R 2,831	-R 23,764	-R 127,414
Foreign flows into SA bond market	-R 3,216	-R 10,627	-R 21,147
Total foreign flows	-R 6,047	-R 34,391	-R 148,561

Source : Bloomberg

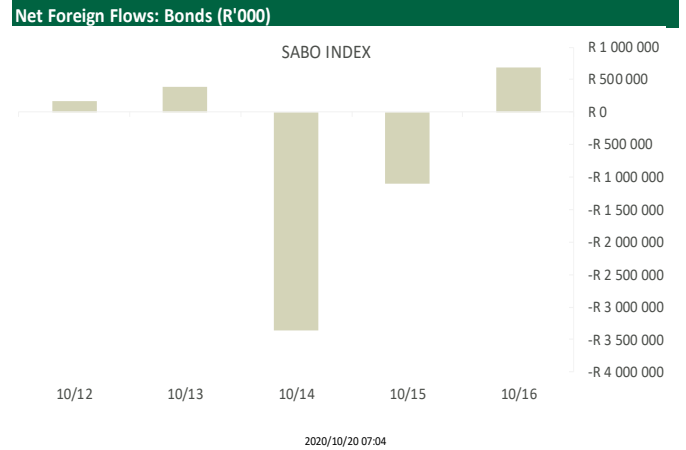
2020/10/20 07:04

Foreign Equity Flows: 5 Day History



Source: Bloomberg, Nedbank

Foreign Bond Flows: 5 Day History



Source: Bloomberg, Nedbank

Economic Calendar

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	Country	Event	Period	Survey	Actual	Prior	Revised
19-October							
01:50 AM	JN	Imports YoY	SEP	-21,40%	-17,20%	-20,80%	-
01:50 AM	JN	Trade Balance Adjusted	SEP	JPY 848,7b	JPY 475,8b	JPY 350,6b	JPY 359,0b
01:50 AM	JN	Exports YoY	SEP	-2,40%	-4,90%	-14,80%	-
04:00 AM	CH	Industrial Production YoY	SEP	5,80%	6,90%	5,60%	-
04:00 AM	CH	Retail Sales YoY	SEP	1,60%	3,30%	0,50%	-
04:00 AM	CH	GDP SA QoQ	3Q	3,30%	2,70%	11,50%	11,70%
04:00 AM	CH	GDP YoY	3Q	5,50%	4,90%	3,20%	-
20-October							
08:00 AM	GE	PPI YoY	SEP	-1,40%	-	-1,20%	-
09:00 AM	SA	Leading Indicator	AUG	-	-	99,9	-
10:00 AM	EC	ECB Current Account SA	AUG	-	-	EUR 16,6b	-
02:30 PM	US	Building Permits MoM	SEP	2,98%	-	-0,90%	-
02:30 PM	US	Housing Starts MoM	SEP	3,46%	-	-5,10%	-
02:30 PM	US	Building Permits	SEP	1520k	-	1470k	-
02:30 PM	US	Housing Starts	SEP	1465k	-	1416k	-
21-October							
08:00 AM	UK	PSNB ex Banking Groups	SEP	GBP 33,5b	-	GBP 35,9b	-
08:00 AM	UK	CPI YoY	SEP	0,60%	-	0,20%	-
08:00 AM	UK	PPI Input NSA YoY	SEP	-5,40%	-	-5,80%	-
22-October							
11:00 AM	EC	Govt Debt/GDP Ratio	2019	-	-	84,10%	-
04:00 PM	EC	Consumer Confidence	OCT A	-15,00	-	-13,90	-
04:00 PM	US	Leading Index	SEP	0,60%	-	1,20%	-
04:00 PM	US	Existing Home Sales	SEP	6,30m	-	6,00m	-
04:00 PM	US	Existing Home Sales MoM	SEP	5,00%	-	2,39%	-
05:00 PM	US	Kansas City Fed Manf. Activity	OCT	11,0	-	11,0	-

Source: Bloomberg

2020/10/20 07:03

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Money Market Corporate Sales Desk

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