

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 recovery sees it trade back towards the lower end of its recent range
Commodities	Oil climbed amid expectations that the OPEC+ will maintain its production curbs
Equities	Asian markets are trading with a cautious bias and with indices a little mixed as investors assess the default risk from US hedge funds, rising COVID-19 cases in Europe and the lack of positive catalysts to spur the markets higher

Key Overnight Factors and Upcoming Events This Week

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Date	Region	Event	Actual/Expected/Prior	Implications
30/03	US	Conference Board Consumer Confidence	--/96.8/91.3	Confidence expected to improve, as indicated by the University of Michigan Sentiment indicator
30/03	JN	Unemployment Rate	2.9%/3.0%/2.9%	Unemployment remained unchanged at 2.9% in February, better than consensus which expected an increase to 3.0%
30/03	JN	Retail Sales	-1.5%/-2.8%/-2.4%	Retail sales increased by 3.1% m/m in February
31/03	SA	Trade Balance	--/18.8b/11.8b	Driven by growth in exports and low import growth given current domestic economic conditions

Source: Nedbank

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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	
R2023-1,9 yrs	5,32	-1,00	7,30	79,70	-193,30	↑
R186-5,7 yrs	7,42	-0,10	6,30	75,10	-305,10	↑
R2030-8,8 yrs	9,43	-0,30	39,10	69,70	-216,20	↑
R2048-26,9 yrs	11,38	-0,10	63,20	57,30	-98,80	↑
US 10 yr	1,76	5,27	35,51	84,69	103,38	↑
UK 10 yr	0,79	3,10	-3,20	59,10	42,10	↓
German 10 yr	-0,28	3,40	-2,40	28,50	20,60	↓
Japan 10 yr	0,09	1,50	-7,20	6,90	7,10	↓

Money Market	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
SA repo rate	3,50	0,00	0,00	0,00	-175,00	→
SA prime rate	7,00	0,00	0,00	0,00	-175,00	→
SA CPI (MTD = previous month)	2,90		-30,00	-20,00	-170,00	↓
SA 3m JIBAR	3,68	0,00	3,30	3,30	-200,00	↑
SA 3m NCD	3,61	-6,25	-3,75	-1,25	-201,25	↓
SA 6m NCD	4,11	0,00	8,75	23,75	-196,25	↑
SA 12m NCD	4,59	1,25	13,75	51,25	-176,25	↑
US 3m LIBOR	0,20	0,60	1,06	-3,94	-117,56	↑
UK 3m LIBOR	0,09	-0,03	2,21	6,26	-46,46	↑
Japan 3m LIBOR	-0,07	0,10	0,75	0,80	-1,58	↑

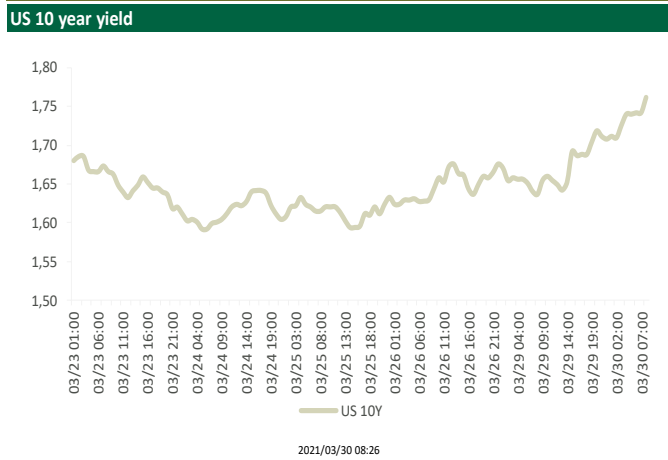
Source: Bloomberg & Nedbank CIB
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FRAs and Swaps	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
3X6 FRA	3,79	0,00	4,00	48,00	-103,00	↑
6X9 FRA	4,04	0,00	4,00	3,00	4,00	↑
9X12 FRA	4,30	3,00	9,00	97,50	-57,00	↑
18X21 FRA	5,16	1,50	17,50	137,00	-66,50	↑
SA 2yr Swap	4,45	-0,60	7,50	89,80	-87,60	↑
SA 3yr Swap	4,93	-0,25	4,75	102,00	-82,00	↑
SA 5yr Swap	5,92	0,25	0,75	117,00	-109,50	↑
SA 10yr Swap	7,60	0,00	1,50	100,00	-148,50	↑
SA 15yr Swap	8,33	-0,50	2,00	88,00	-126,00	↑

Spreads	Last price	Δ				MTD trend
		1d	MTD	YTD	12Month	
	%	bps	bps	bps	bps	
2v10y	-3,15	-0,60	6,00	-10,20	60,90	↑
3v10y	-2,67	-0,25	3,25	2,00	66,50	↑
R2030-R2023	4,12	0,70	31,80	-10,00	-22,90	↑
R2048-R2030	1,94	0,20	24,10	-12,40	117,40	↑
5y-R2030	-3,51	0,55	-38,35	47,30	106,70	↑
10y-R2030	-1,84	0,30	-37,60	30,30	67,70	↓
15y-R2030	-1,10	-0,20	-37,10	18,30	90,20	↓
SA 5yr CDS spread - basis points	237,00			-5,00	29,00	↓

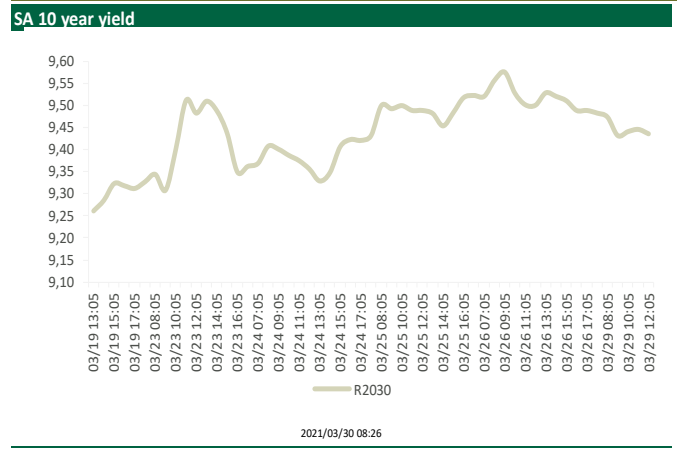
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US 10 Year Yield



Source: Bloomberg, Nedbank

SA 10 Year Yield



Source: Bloomberg, Nedbank

Currencies

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- The new week got underway with the rand trading around the 15.0500 level. In another muted trading session, the rand traded around the 15.00 pivot for much of the session, encountering some support in the early New York session, which saw it reach a best level of 14.8750 going into the time of the local close. Activity in the overnight sessions was limited, and this morning, the local unit is currently trading at 14.8850, the EURZAR is trading at 17.5115 and the GBPZAR is currently trading at 20.5110.
- On the international front, the markets continued to trade within limited ranges, with the EURUSD trading between 1.1760 and 1.1793 on the day; this morning, it is currently trading around the 1.1765 level. The GBPUSD yesterday encountered some buying interest, which saw it trade to a best level of 1.3847 before trading back to the current levels around 1.3770.
- Gold is this morning currently trading at 1,706.50, some USD20 off from the same time yesterday.
- Data releases scheduled for today: locally, we have money supply, private credit, non-farm payrolls, monthly budget and the release of the SARB's quarterly bulletin. From Europe, we have French consumer confidence, and for the zone, we have consumer, economic, industrial and services confidence indicators and German CPI. From the US, we have house price index and consumer confidence releases.
- The rand yesterday recovered to trade sub-15.0000 and, of potentially greater significance, tested the 14.9000 technical support level where it currently trades, despite the majority of the emerging-market currencies remaining under sustained pressure.
- Possible trading range for the rand today: 14.7000 to 15.2000

Majors	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	USD trend
GBPUSD	1.38	0.03	-1.20	0.70	10.89	↓	USD strength
EURUSD	1.18	-0.03	-2.60	-3.72	6.45	↓	USD strength
USDJPY	109.98	0.15	3.10	-6.12	2.02	↑	USD strength
USDAUD	1.31	-0.22	0.75	0.58	-19.32	↑	USD strength

Rand crosses	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	ZAR trend
USDZAR	14.88	-0.22	-1.61	1.25	-20.53	↓	ZAR strength
GBPZAR	20.48	-0.19	-2.72	1.93	-8.77	↓	ZAR strength
EURZAR	17.50	-0.25	-4.25	-2.57	-13.25	↓	ZAR strength
AUDZAR	11.38	-0.02	-2.43	0.68	2.74	↓	ZAR strength
ZARJPY	7.39	0.44	4.62	4.91	18.75	↑	ZAR strength

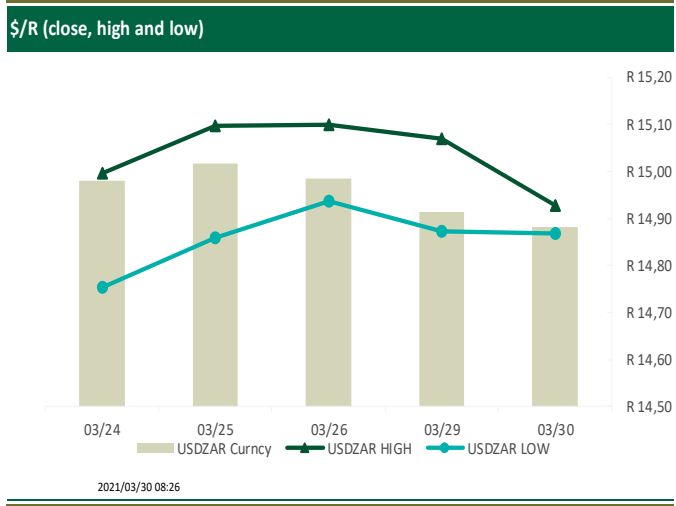
African FX	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	ZAR trend
ZARMWK (Malawian kwacha)	52.30	-0.77	1.11	-0.39	21.45	↑	ZAR strength
ZARBWP (Botswana pula)	0.74	0.17	2.18	1.09	10.26	↑	ZAR strength
ZARKES (Kenyan shilling)	7.37	0.22	1.49	-0.85	20.96	↑	ZAR strength
ZARMLJ (Mauritian rupee)	2.72	0.23	3.09	0.66	19.35	↑	ZAR strength
ZARNGN (Nigerian naira)	27.43	0.09	1.38	1.29	21.68	↑	ZAR strength
ZARGHS (Ghanian cedi)	0.39	0.31	1.86	-2.94	17.14	↑	ZAR strength
ZARZMW (Zambian kwacha)	1.48	0.22	2.82	2.92	33.56	↑	ZAR strength
ZARMZN (Mozambican metical)	4.65	0.22	-6.09	-9.61	20.07	↓	ZAR weakness

Emerging Market FX	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend	USD trend
USDBRL (Brazilian Real)	5.78	0.46	3.11	10.11	10.19	↑	USD strength
USDTRY (Turkish Lira)	8.26	0.61	10.09	9.93	20.42	↑	USD strength
USDMXN (Mexican Peso)	20.60	-0.11	-1.25	3.32	-15.55	↓	USD weakness
USDINR (Indian Rupee)	72.93	0.57	-0.74	-0.19	-3.41	↓	USD weakness
USD RUB (Russian Ruble)	75.66	-0.02	1.37	1.65	-4.85	↑	USD strength

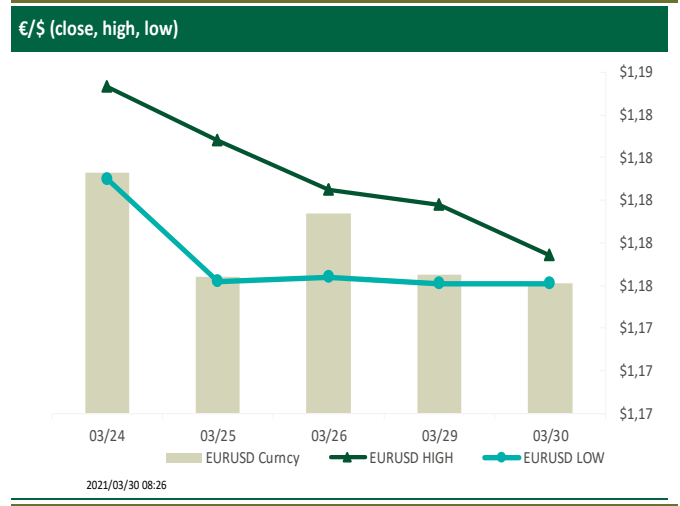
Source: Bloomberg & Nedbank CIB
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*Please note that the sign on the % change reflects the change on the headline number. The narrative indicates the trend direction over the month. For trade in any of these currencies, contact our FX dealing desks

USD/ZAR



EUR/USD



Commodities

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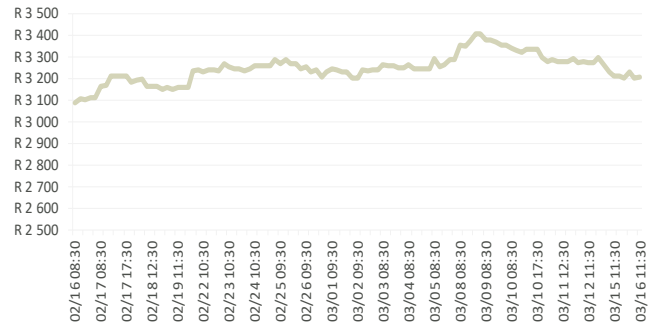
- Oil climbed amid expectations that the OPEC+ will maintain its production curbs at its meeting this week. WTI for May delivery dropped 0.2% to \$61.5 while the Brent dropped 0.3% to \$64.80 a barrel.

Commodities	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	MTD trend
Brent near future (\$)	64,80	-0,28	-2,01	25,10	184,71	↓
WTI crude (\$)	61,37	-0,31	-0,21	26,48	205,48	↓
Gold spot (\$)	1 706,70	-0,32	-1,58	-10,10	5,19	↓
Platinum spot (\$)	1 180,73	0,13	-1,03	10,13	62,14	↓
SA white maize spot (R)	3 085,00	-1,25	-3,71	-6,99	12,71	↓

Source: Bloomberg & Nedbank CIB
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SA White Maize

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

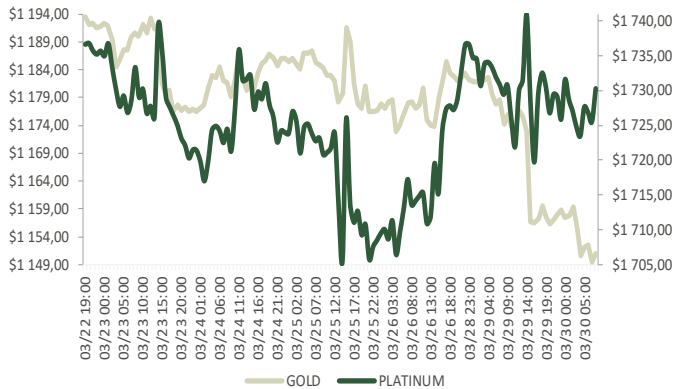


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Source: Bloomberg, Nedbank

Platinum vs. Gold

Platinum vs. Gold

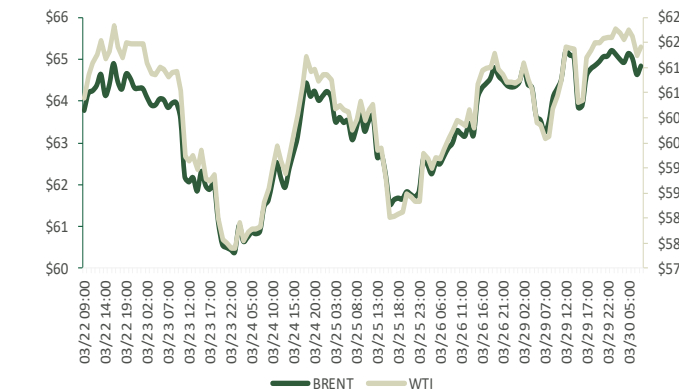


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Source: Bloomberg, Nedbank

Brent Crude vs. West Texas Intermediate

Brent Crude vs West Texas Intermediate



2021/03/30 08:26

Source: Bloomberg, Nedbank

Equities

Cash equities | +2711 535 4030/31

South Africa

- Top40 +0.39%; Evergreen – to dislodge or not to dislodge?...that is the question; oil and commodity prices swung between gains and losses as news filtered on whether the Suez Canal was open or closed; diversified miners traded within a c.2% range, seeing local buying on weakness. Precious metals -0.19% on news that Nor nickel unit completes phase 2 of repairs of flooded mines...SSW -2.4% and AMS -2.8%. SA Inc. was well bid with more broker upgrades coming through on NED +4.5%; retailers +1.8% and SAPY +1.3%; rand largely unchanged. SAC +4.2%; results not that great, but headline numbers spurred some buying interest; LTV looks decent relative to peers' but not all roses. Flows: saw some profit taking in retailers and the cash moving back into NPN and rand hedges; food producers continue to garner foreign interest. On the data front, US Dallas Fed activity came in at 28.9 index points vs 14.5 in March. Turnover at R20.3bn.

UK/Europe

- European stocks ended higher on Monday although buying interest remained somewhat subdued in most of the markets in the continent amid lingering concerns about rising coronavirus cases and lockdown measures. The Stoxx 600 edged up 0.16%. Germany's DAX climbed 0.47%, France's CAC 40 gained 0.45%, the UK's FTSE 100 ended 0.07% down and Switzerland's SMI slid 0.24%.

USA

- US stocks closed mixed after a somewhat volatile session on Monday as the mood remained a bit cautious amid news about a large hedge fund defaulting on a margin call. The major averages ended mixed. The Dow, which hit a fresh high at 33,259.00, ended the session at 33,171.37 with a gain of 98.49 points or 0.3%. The Nasdaq settled at 13,059.65, losing 7.08 points or 0.6%, while the S&P 500 edged down 3.45 points or 0.09% to 3,971.09

Asia

- Asian markets are trading with a cautious bias and with indices a little mixed as investors assess the default risk from US hedge funds, rising COVID-19 cases in Europe and the lack of positive catalysts to spur the markets higher. The Nikkei is down 0.13% despite better-than-expected retail sales data while the Hang Seng is up 1.20%, with the likes of Tencent gaining 1.06%. The Australian ASX is down 0.90%, with BHP dropping 1.77%.

Developed Markets		Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2020 Performance	MTD trend
Dow Jones	33 171,37	0,30	7,24	8,38	48,57	22,34	↑	
Nasdaq	13 059,65	-0,60	-1,01	1,33	67,99	35,23	↓	
S&P 500	3 971,09	-0,09	-4,20	5,72	51,18	28,88	↑	
DI Eurostoxx 50	3 882,87	0,42	6,78	9,30	40,40	25,12	↑	
DAX	14 817,72	0,47	7,48	8,01	50,96	25,22	↑	
CAC	6 015,51	0,45	5,48	8,36	37,39	26,46	↑	
FTSE	6 736,17	-0,07	3,90	4,27	21,07	12,00	↑	
ASX200	6 738,45	-0,90	0,98	2,30	30,05	13,38	↑	
Nikkei 225	29 432,70	0,16	1,61	7,25	54,22	20,93	↑	
MSCI World	2 811,53	-0,12	3,10	4,52	50,31	25,19	↑	

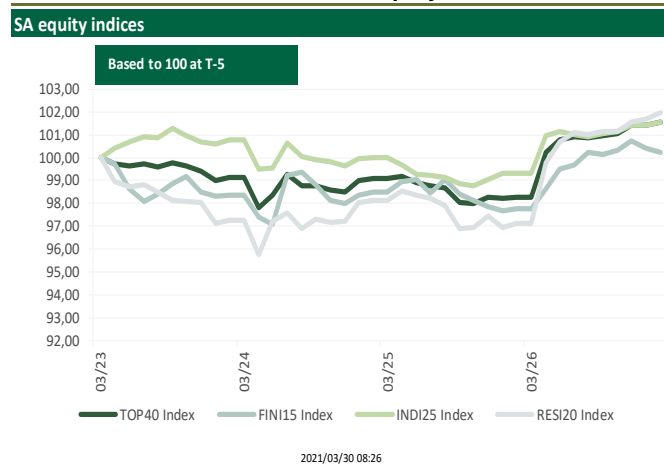
Emerging Markets		Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2020 Performance	MTD trend
Hang Seng	28 654,07	1,11	-1,13	5,23	23,64	9,07	↓	
Shanghai	3 446,81	0,34	-1,77	-0,76	25,47	23,72	↓	
Brazil Bovespa	115 418,70	0,56	4,89	-3,02	54,63	27,07	↑	
India - NSE	49 867,20	1,75	1,56	4,43	67,25	14,38	↑	
Russia Micex	3 529,33	1,13	5,46	7,31	45,04	28,21	↑	
MSCI Emerging	1 310,11	0,20	-2,18	1,46	57,46	15,38	↓	

SA Indices		Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2020 Performance	MTD trend
JSE All Share	67 089,37	0,38	1,44	12,93	54,54	8,24	↑	
Top 40	61 443,90	0,33	1,14	12,99	54,55	8,75	↑	
Resi 10	66 931,58	-0,83	-0,78	16,25	84,34	20,01	↓	
Indi 25	88 427,17	0,58	2,65	13,51	39,85	8,82	↑	
Fini 15	12 445,56	2,46	2,01	3,19	42,01	-4,30	↑	

Source: Bloomberg & Nedbank CIB

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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
30 March 2021		
HMN	Hammerson Plc	dividend @ 4.0814cps

Source: JSE

SHARE CODE	SHARE NAME	DIVIDEND / INTEREST RATE
6 April 2021		
AFE	AECI Ltd	dividend @ 470cps
FVT	Fairvest Property Holdings	dividend @ 10.59cps
LBR	Libstar Holdings Ltd	dividend @ 25cps
MNP	Mondi Plc	dividend @ 734.328450cps
QLT	Quilter Plc	dividend @ 76.887860cps
SBKP	Std Bank Group 6.5% Prefs	dividend @ 3.25cps
SBPP	Std Bank Group Pref	dividend @ 272.93cps
SHG	Sea Harvest Group Ltd	dividend @ 45cps
SHP	Shoprite Holdings Ltd	dividend @ 191cps
SLM	Sanlam Ltd	dividend @ 300cps

Source: JSE

JSE Performance

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Top40 constituents	Last price	%Δ -1d	%Δ MTD	%Δ YTD	%Δ 12Month	2020 Performance	MTD trend
ABG : Absa Group Ltd	128,45	4,53	5,86	7,17	102,92	-19,72	↑
AGL : Anglo American Plc	580,41	-1,70	-0,08	19,67	97,75	21,60	↓
AMS : Anglo American Platinum Ltd	2 177,51	-2,83	18,72	50,89	202,92	10,39	↑
ANG : Anglogold Ashanti Ltd	320,54	5,56	5,73	-6,42	-5,20	8,22	↑
APN : Aspen Pharmacare Holdings Lt	141,67	2,10	-0,55	13,00	57,41	5,16	↓
BHP : Bhp Group Plc	430,00	-0,74	-9,87	10,52	59,26	17,98	↓
BID : Bid Corp Ltd	293,74	2,40	3,67	11,68	43,29	-20,34	↑
BTI : British American Tobacco Plc	579,73	0,30	10,88	6,28	-0,52	-8,69	↑
BVT : Bidvest Group Ltd	168,73	4,57	0,29	7,46	23,16	-23,32	↑
CFR : Financiere Richemont-Dep Rec	144,27	0,03	-1,33	10,05	49,35	19,69	↓
CLS : Clicks Group Ltd	246,97	0,32	0,90	-2,26	-1,62	-1,53	↑
CPI : Capitec Bank Holdings Ltd	1 420,70	2,38	6,12	-0,83	71,54	-0,94	↑
DSY : Discovery Ltd	137,50	0,36	-2,93	-10,45	88,05	27,28	↓
EXX : Exxaro Resources Ltd	175,50	0,23	2,57	26,35	79,05	5,92	↑
FSR : Firststrand Ltd	52,97	4,17	5,27	3,78	41,29	-18,73	↑
GFI : Gold Fields Ltd	140,81	2,79	11,95	2,36	40,98	43,50	↑
GLN : Glencore Plc	58,54	0,05	-4,87	25,01	118,84	7,95	↓
GRT : Growthpoint Properties Ltd	13,24	1,46	-3,15	5,33	13,75	-43,15	↓
IMP : Impala Platinum Holdings Ltd	269,80	-2,01	9,64	33,63	256,93	40,68	↑
INL : Investec Ltd	42,98	0,42	8,45	17,30	31,72	-37,83	↑
INP : Investec Plc	44,80	0,16	8,47	18,99	40,70	-42,72	↑
MCG : Multichoice Group Ltd	131,30	1,66	2,86	-2,01	55,13	0,00	↑
MNP : Mondi Plc	392,67	-0,26	7,50	14,44	33,33	5,16	↑
MRP : Mr Price Group Ltd	198,11	1,99	13,58	16,09	80,44	-6,49	↑
MTN : Mtn Group Ltd	88,30	1,47	21,47	46,70	117,49	-27,03	↑
NED : Nedbank Group Ltd	139,34	5,17	6,67	7,62	90,36	-39,58	↑
NHM : Northam Platinum Ltd	255,75	0,25	15,25	22,06	279,45	69,50	↑
NPN : Naspers Ltd-N Shs	3 546,49	0,55	0,81	17,46	41,36	31,80	↑
NRP : Nepi Rockcastle Plc	92,25	1,16	-0,57	-1,34	34,09	-21,25	↓
OMU : Old Mutual Ltd	12,61	0,32	-6,25	6,06	14,95	-39,52	↓
PRX : Prosus Nv	1 654,74	-0,86	-6,20	3,02	35,18	52,39	↓
REM : Remgro Ltd	106,51	4,98	2,80	10,72	23,55	-32,51	↑
RNI : Reinet Investments Sca	296,23	2,09	4,82	7,48	7,72	-0,68	↑
SBK : Standard Bank Group Ltd	127,90	1,69	-3,83	0,65	33,24	-24,50	↓
SHP : Shoprite Holdings Ltd	159,12	-1,61	19,58	13,66	31,85	11,18	↑
SLM : Sanlam Ltd	60,19	0,99	-0,97	2,45	23,29	-25,73	↓
SOL : Sasol Ltd	217,24	-0,64	15,29	62,20	589,65	-55,87	↑
SPP : Spar Group Limited/The	194,32	-0,26	2,08	2,52	9,11	-4,04	↑
SSW : Sibanye Stillwater Ltd	65,76	-2,43	-6,08	9,60	173,66	67,18	↓
VOD : Vodacom Group Ltd	131,13	0,46	5,26	5,42	14,90	7,88	↑
WHL : Woolworths Holdings Ltd	49,85	1,73	8,06	26,07	84,08	-18,64	↑

Source: Bloomberg & Nedbank CIB

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Foreign Flows

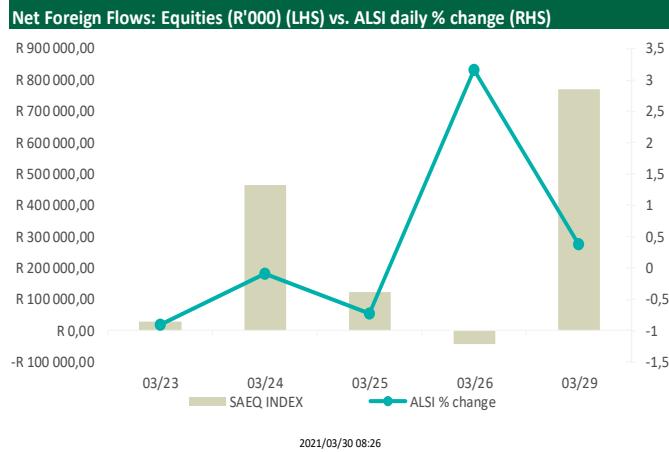
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Foreign flows (bn)	Week to 26 Mar 2021	Month to 26 Mar 2021	Year to 26 Mar 2021
Foreign flows into SA equity market	R 0,571	-R 15,561	-R 124,784
Foreign flows into SA bond market	R 3,024	-R 44,967	-R 45,511
Total foreign flows	R 3,594	-R 60,528	-R 170,295

Source : Bloomberg

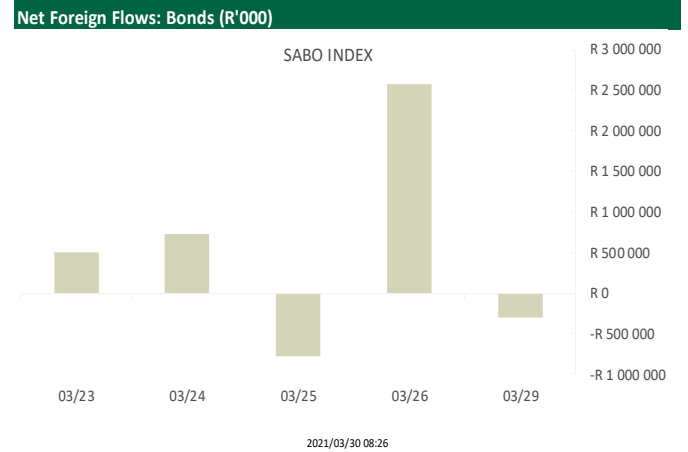
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Foreign Equity Flows: 5 Day History



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
29-March							
10:30 AM	UK	Net Consumer Credit	FEB	GBP -1,50b	GBP -1,20b	GBP -2,39b	GBP -2,70b
10:30 AM	UK	M4 Money Supply YoY	FEB	-	13,60%	13,30%	-
04:30 PM	US	Dallas Fed Manf. Activity	MAR	16,8	28,9	17,2	-
30-March							
01:30 AM	JN	Job-To-Applicant Ratio	FEB	1,09	1,09	1,10	-
01:30 AM	JN	Jobless Rate	FEB	3,00%	2,90%	2,90%	-
01:50 AM	JN	Retail Trade YoY	FEB	-2,80%	-1,50%	-2,40%	-
08:00 AM	SA	Money Supply M3 YoY	FEB	9,00%	7,48%	9,15%	-
08:00 AM	SA	Private Sector Credit YoY	FEB	3,30%	2,62%	3,26%	-
11:00 AM	EC	Economic Confidence	MAR	96,0	-	93,4	-
02:00 PM	GE	CPI YoY	MAY F	1,70%	-	1,30%	-
02:00 PM	SA	South Africa Budget	FEB	ZAR -17,1b	-	ZAR -76,2b	-
03:00 PM	US	S&P CoreLogic CS 20-City YoY NSA	JAN	11,20%	-	10,10%	-
04:00 PM	US	Conf. Board Consumer Confidence	MAR	96,9	-	91,3	-
31-March							
01:50 AM	JN	Industrial Production YoY	FEB P	-1,80%	-	-5,20%	-
08:00 AM	UK	GDP YoY	4Q F	-7,80%	-	-7,80%	-
08:00 AM	UK	GDP QoQ	4Q F	1,00%	-	1,00%	-
11:00 AM	EC	CPI Core YoY	MAR P	1,10%	-	1,10%	-
11:00 AM	EC	CPI Estimate YoY	MAR	1,40%	-	0,90%	-
02:00 PM	SA	Trade Balance Rand	FEB	22,1b	-	11,8b	-
02:15 PM	US	ADP Employment Change	MAR	550k	-	117k	-
03:45 PM	US	Chicago Purchasing Manager	MAR	61,0	-	59,5	-
04:00 PM	US	Pending Home Sales NSA YoY	FEB	6,50%	-	8,20%	-
01-April							
12:00 AM	SA	Naamsa Vehicle Sales YoY	MAR	16,4%	-	-13,3%	-
03:45 AM	CH	Caixin China PMI Mfg	MAR	51,3	-	50,9	-
08:00 AM	GE	Retail Sales YoY	FEB	-5,00%	-	-9,30%	-
11:00 AM	SA	Barclays Manufacturing PMI	MAR	52,3	-	53,0	-
04:00 PM	US	ISM Manufacturing	MAR	61,5	-	60,8	-

Source: Bloomberg

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