IJG Daily Bulletin Monday, 01 February 2021



Level Net Change dd/9 mot % yd/% S2Wk Lingh S2Wk Lingh Economic News NSX Overall 122 1-15 0.00 1.53 7.77 0.53 M Manufacturing Landows JEE Abal 0.242 7.34.02 1.16 0.00 -3.58 0.0347 3.777 US Normality Normality </th <th>Local Indices</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>The Day Ahead</th>	Local Indices								The Day Ahead
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Nyk 18/42 -0.03 -0.13 -0.24 2.03 10.05 Parts Pa									worth of Mediclinic International exchangin
Name 1100 1000 <th< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>hands. On the local bourse N\$992,002 worth</td></th<>									hands. On the local bourse N\$992,002 worth
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US\$/vi 104.6s 0.44 0.42 0.00 -1.37 112.23 101.19 market, No ETF trades were recorded. Commodities 55.00 4.00 -0.06 -0.01 0.69 65.95 57.88 32.00 Gold 184/265 4.48 0.24 0.29 13.91 The FTS2/SE Africa All Share Index foll 1.2 Silver 2.69.9 0.48 0.24 2.92 13.91 State and Irongate C. Silver 2.69.9 0.48 3.59 8.33 2.986 11.64 NSL Local and DevX 1.91 1.91 -8.29 2.536.50 1957.20 NSL Local and DevX Last Change Last % mid % ytd % 52Wk Low NSL Local and DevX 1.00 0.00 0.00 0.00 1.00 1.00 0.00 1.00 1.00 0.00 1.00 1.00 0.00 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01 1.01<									worth of Letshego Holdings Namibia traded
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SA versus Namibian Bonds SA Bonds YTM Current Price Chg [bp] NA Bonds YTM Current Price Chg [bp] Chg [bp] Chg [bp] Chg [bp] Colspan="5">Colspan="5" SA Bonds YTM Current Price Chg [bp] GC21 4.48 -15 3.50 Inflation (y/y) 5.1% 2.6% R2030 8.72 95.58 -2.50 GC21 7.56 89 -2.50 M2 (y/y) 6.4% 10.5% 10.6 10.6 10.6 2.6 6.67 0 -2.50 M2 (y/y) 6.4% 10.5% 10.6 2.6 7.7 5.6 8.9 -2.50 M2 (y/y) 6.4% 11.15 8.0									bioad decime.
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NAM Bank Rate 3.75 03 Nov NAM Prime Rate 7.50 15 Dec									
NAM Prime Kate 7.50 1 Prices quoted in Australian cents ³ Prices quoted in 15 Dec									

¹ Prices quoted in Australian cents ³ Prices quoted Canadian cents Commodities are quoted in US\$ Source: Bloomberg, NSX, IJG, JSE

International News	Company News
US Personal Income rose 0.6% m/m in December, as per the Bureau of Economic Analysis.	In a potentially high-stakes bet on a rebound in the pandemic- ravaged tourism industry, an Old Mutual asset management arm has snapped up the concession owner of Cape Point's facilities from
${\rm US}\ {\rm Personal}\ {\rm Spending}\ {\rm fell}\ 0.2\%\ {\rm m/m}\ {\rm in}\ {\rm December},$ as per the Bureau of Economic Analysis.	Thebe Investment Corporation, one of the oldest black-owned companies. "We believe strongly that the tourism industry will return
US MNI Chicago PMI rose 5.1 points to 63.8 in January, above market, as per Market News International.	to its former glory post Covid-19 and, given the quality of the assets of the group, feel that the Thebe Tourism Group is well positioned to capitalise on the eventual recovery of the sector," said Amrish Narrandes, head of unlisted equity deals at Old Mutual's
US Pending Home Sales fell 0.3% m/m, but rose 22.8% y/y in December, as per the National Association of Realtors.	Futuregrowth Asset Management Business Day
US University of Michigan Sentiment Index was revised down 0.2 points to 79.0 in January.	Sasol's shares rallied on Friday after it told shareholders it will deliver a strong set of results for the first half of its financial year, despite hurricanes that affected output at its Lake Charles project in the US.
Eurozone M3 Money Supply rose 12.3% y/y in December, above market, as per the European Central Bank.	At their best, they traded over 13% higher. In a trading update, the energy and chemicals group said the improvement was achieved despite the effects of the Covid-19 pandemic, a big decline in crude prices and achieve the micel, prices that production of annovimately.
Germany GDP rose 0.1% q/q, but fell 2.9% y/y in Q4, as per the Federal Statistical Office.	prices and softer chemicals prices. It lost production of approximately 300kt for the 2021 financial half year due to the hurricanes that hammered the US Gulf Coast InceConnect
Germany Unemployment Rate was unchanged at 6.0% in January, as per the Deutsche Bundesbank.	Telecoms regulator, the Independent Communications Authority of SA (Icasa), will oppose MTN's case over what the mobile operator says is a flawed spectrum auction process that will disadvantage its ability
Local News Air Namibia deal: Govt not consulted. Air Namibia has exactly 18 days to raise N\$104 million to prevent breaching its last-minute settlement agreement clinched with Challenge Air last Friday. The cash-strapped national airline will not have the luxury of running to government for a bailout after public enterprises minister Leon Jooste	to compete in 5G services. On Friday, Icasa, which is reviewing MTN's court application, said it has instructed its "legal representatives to oppose the application" -Business Day EOH has continued to reduce debt as it sells non-core assets.
said government will not help it pay the Challenge Air bill. Speaking to Namibian Sun over the weekend, Jooste said government had no prior knowledge of the settlement agreementNamibian Sun	Declining interest rates have also cut its interest bill and CEO Stephen van Coller says the company is in much better shape than it was when he took over two years ago. In a pre-close update to shareholders, the technology services group said it had repaid a further R409 million
Trustco suffers mega-million loss. Trustco Group Holdings suffered a total comprehensive loss of nearly N\$466.9 million for the 18 months ended 30 September 2020, the diversified entity said on Friday. Commenting on the drop of 148% - or 132% if normalised – Trustco said a significant portion of the loss or N\$279 million was due to property revaluations triggered by adverse market conditions. "The 18 month financial period reported on turned out to not only be a challenging period for Trustco, but also for Namibia and the world," the group saidNamibian Sun	since the end of its last financial year in July, mostly using the proceeds from disposals. Falling interest rates and a lower outstanding gross debt balance of about R2 billion had resulted in materially lower and more manageable financing costs InceConnect Barloworld says its new financial year got off to a good start, supported by critical actions it took last year and as recent acquisitions performed ahead of expectations. In a first-quarter trading update, the industrial holding company said while overall
Fuel prices go up by 50 cents in February. The Ministry of Mines and Energy announced that as of midnight 3 February, the price of petrol and diesel will increase by 50 cents per litre. The new fuel prices will be N\$11.85 per litre for petrol and N\$ 11.88 per litre for diesel. The month of January 2021 saw an under-recovery of about 102 cents on petrol and about 105 cents on diesel. Spokesperson of the ministry, Andreas Simon said the last review also had under-recoveries, and although those were moderate in comparison to the current figures, the Ministry resolved at that time not to increase fuel prices considering that seasonal farming activities in most of the country were just kicking-off and a lot of travelling from various holiday destinations was taking place Namibia Economist	trading conditions continued to be affected by Covid-19, volatile commodity prices and infrastructure cycles, it had benefitted from the easing of lockdown restrictions, the incorporation of Equipment Mongolia, as well as the inclusion of Ingrain, formerly Tongaat Hulett Starch, from 1 November InceConnect
Nam, Bots stokvel for vaccines. Botswana president Mokgweetsi Masisi said the scramble for the Covid-19 vaccine has exposed how development gives countries leverage when competing for supplies. His country and Namibia, both with small populations, will, therefore, collaborate to procure additional Covid-19 vaccine doses to complement the quantities secured under the Covax facility. "The whole Covid-19 vaccines story is not just a narrative of holding, there is a reality of development. It speaks to who has what and who has not. Let us face it, we don't have the plants that makes the vaccine. So, is it surprising that those who have them keep to their purse, especially when it is life-saving?" he asked. – Namibian Sun	
SA Economic News	SADC
South African labour unions have taken their bid to get pay increases to the country's highest legal authority after a lower court ruled the government could renege on a salary increase. The Public Servants Association applied to the Constitutional Court for leave to appeal a Labour Appeals Court ruling that rejected an application aimed at forcing the government to implement a three-year pay deal that was agreed in 2018. The court held the agreement was unlawful because the amount exceeded what the National Treasury had set aside and that it hadn't been properly approved.	Tanzania's earnings from gold exports rose 34% last year, helped by increased output and higher prices, the Bank of Tanzania said in its latest monthly economic review. Gold exports fetched US\$2.95 billion, up from US\$2.21 billion in 2019. This came as tourism earnings declined 59% to US\$1.1 billion amid the coronavirus pandemic. The current account deficit narrowed to US\$662 million from US\$1.3 billion as imports declined. Oil imports fell 30% to US\$1.25 billion, while exports of manufactured goods rose 13% to US\$912 million.

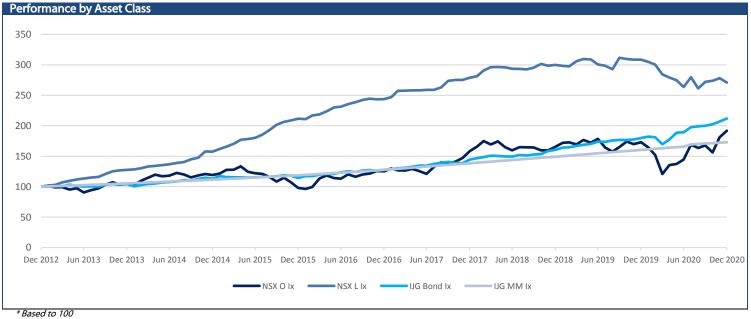
Source: NSX, Bloomberg, CBS, BoN, StatsSA, Deutsche Securities, The Namibian, The Namibian Sun, New Era, Republikein, The Observer, Business Day

Overall Index								
Ticker	Shares Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ANE		900	-	-	-	-	1,000	900
ANM	371	50,050	(668.0)	(1.32)	-	3.20	58,548	21,095
B2G		7,533	22.0	0.29	-	(9.70)	12,740	71
CGP		1,296	-	-	-	(0.08)	1,545	1,000
BWL		9,473	362.0	3.97	-	3.98	10,476	5,530
FNB		2,307	-	-	-	0.13	3,349	2,015
FST	1,008	4,789	(63.0)	(1.30)	-	(6.17)	6,230	3,343
IVD		3,845	(7.0)	(0.18)	-	4.94	6,377	2,711
KFS	15,603	924	19.0	2.10	-	2.67	949	456
LHN	999	240	-	-	-	(9.77)	300	230
MEP	150,000	5,907	(53.0)	(0.89)	-	3.74	7,716	5,211
MIM		1,647	(8.0)	(0.48)	-	4.51	2,107	1,300
NAM		62	-	-	-	-	65	61
NBK		12,239	(141.0)	(1.14)	-	(5.48)	20,813	7,306
NBS	32,514	3,051	1.0	0.03	-	(8.24)	4,799	2,590
NHL		159	-	-	-	-	160	159
OCS	151,561	6,672	109.0	1.66	-	3.84	7,450	4,904
OMM		1,298	(7.0)	(0.54)	-	9.17	1,790	940
ORY		1,200	-	-	-	(14.29)	1,899	1,200
PNH		1,175	-	-	-	2.26	1,175	1,000
SILP		12,790	-	-	-	-	12,791	12,780
SLA	659	5,766	(166.0)	(2.80)	-	(1.86)	7,615	4,544
SNB		12,589	(260.0)	(2.02)	-	(0.94)	17,031	8,441
SNO		741	-	-	-	7.39	911	685
SNM		26,712	(338.0)	(1.25)	-	4.84	29,768	20,633
SRH		14,012	(29.0)	(0.21)	-	0.09	14,988	10,028
TRW		4,478	84.0	1.91	-	21.52	5,063	2,490
πο		350	-	-	-	(16.67)	650	161
VKN	677,512	688	9.0	1.33	-	(14.00)	1,771	430

¹ Prices quoted in Australian cents. ² Prices quotes in Canadian Dollars. Source: Bloomberg, NSX, IJG

ETF's								
Ticker	Volume Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ENXPLD		33,716	-750.00	-2.18	0.00	-0.50	42,103	25,639
ENXGLD		27,378	-185.00	-0.67	0.00	0.42	36,120	22,335
ENXPLT		16,061	-80.00	-0.50	0.00	4.15	17,029	9,986
NFNAMA		1,585	1.00	0.06	0.00	0.51	1,606	1,206
NGNGLD		26,202	-170.00	-0.64	0.00	0.35	33,871	21,554
NGNPLD		33,612	-889.00	-2.58	0.00	-0.73	41,805	26,262
NGNPLT		15,873	-133.00	-0.83	0.00	3.41	16,726	9,841
SXNEMG		5,588	-38.00	-0.68	0.00	6.20	5,920	3,547
SXNWDM		5,549	-54.00	-0.96	0.00	2.91	5,800	3,854
SXNNDQ		11,139	-133.00	-1.18	0.00	4.62	11,744	6,769
SXN500		5,744	-49.00	-0.85	0.00	3.53	6,043	3,980

Indices Returns



Government Bonds	YTM	Benchmark	Benchmark YTM	Premium Last Trade	All-In-Price	Clean Price	Modified Duration
GC21	4.480	R2023	4.630	-15	104.503	102.252	0.675
GC22	4.690	R2023	4.630	6	104.108	103.772	0.919
GC23	5.099	R2023	4.630	47	111.943	109.373	2.365
GC24	6.720	R186	6.670	5	115.265	112.216	3.018
GC25	6.910	R186	6.670	24	108.180	105.711	3.444
GC26	6.670	R186	6.670	0	110.401	107.932	4.122
GC27	7.560	R186	6.670	89	102.385	102.078	4.678
GC30	8.780	R2030	8.720	6	95.533	95.226	6.204
GC32	9.615	R213	9.235	38	98.431	95.818	6.684
GC35	11.150	R209	10.350	80	88.642	88.277	7.303
GC37	11.670	R2037	10.695	98	84.637	84.273	7.497
GC40	12.549	R214	10.725	182	82.904	80.058	7.274
GC43	12.876	R2044	10.875	200	79.395	79.012	7.498
GC45	13.103	R2044	10.875	223	76.660	76.282	7.483
GC50	13.322	R2048	10.790	253	77.843	77.450	7.438
GI22	4.103				126.826	125.520	1.623
GI25	4.250				124.558	124.373	4.050
GI29	5.726				103.657	103.464	6.521
GI33	6.823				89.039	87.625	8.726
GI36	7.265	10)/(JCD	1.000	0.4	80.293	80.102	10.008
Eurobond	1.930	10YUSBond	1.086	84	104.012	102.652	0.734
Eurobond 2	3.465	10YUSBond	1.086	238	109.095	107.739	4.160
NAM01	5.650	R2023	4.630	102	106.105	104.385	1.631
NAM03	6.230	R2023	4.630	160	108.778	108.723	2.208
NAM04 Corporate Bonds – Fix	8.450	R186	6.670	178	108.965	108.907	4.187
IFC21	ed 4.787	R2023	4.630	16	102.024	100.922	0.177
FNBX21	4.787 5.240	GC22	4.630	55	102.024	100.922	0.777
BWRj21	5.385	GC21	4.480	91	103.868	101.617	0.672
FBNX27	5.390	GC21 GC22	4.690	70	109.007	105.544	1.064
NWC22	6.480	R2023	4.630	185	106.139	103.595	1.131
BWFH22	6.130	R2023	4.630	150	104.417	104.938	1.384
BWFK22	6.170	R2023	4.630	150	108.314	106.427	1.626
BWFi23	5.930	R2023	4.630	130	109.705	106.791	2.310
DBN23	5.280	R2023	4.630	65	110.670	109.312	2.496
NEDNAM01	7.640	GC24	6.720	92	109.540	109.629	2.789
NEDX2030	7.025	GC25	6.910	12	115.375	111.152	3.237
Corporate Bonds – Flo							
BWJd21	5.492	3 month JIBAR	3.642	185	100.134	99.998	0.217
BWJL21G	5.142	3 month JIBAR	3.642	150	100.732	99.986	0.097
BWJh22	5.462	3 month JIBAR	3.642	182	99.702	99.992	0.053
BWJK22	5.512	3 month JIBAR	3.642	187	99.654	99.983	0.061
BWJi24	5.142	3 month JIBAR	3.642	150	100.405	99.997	0.163
BWJ1e27	5.792	3 month JIBAR	3.642	215	99.668	99.984	0.055
BWJ2e27	3.642	3 month JIBAR	3.642	0	99.791	99.983	0.056
FNBJ21	5.642	3 month JIBAR	3.642	200	99.954	99.997	0.008
FBNJ27	6.142	3 month JIBAR	3.642	250	100.517	99.995	0.158
ORYJ22	5.842	3 month JIBAR	3.642	220	101.043	99.979	0.058
SBNA21	5.242	3 month JIBAR	3.642	160	100.229	99.999	0.198
SBNA23	4.522	3 month JIBAR	3.642	88	100.037	100.000	0.234
NEDNAM02	5.692	3 month JIBAR	3.642	205	100.952	99.975	0.069
NEDJ2028	6.392	3 month JIBAR	3.642	275	99.947	99.997	0.008





IJG Holdings

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