IJG Daily Bulletin Tuesday, 02 August 2022



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NSX Local and DevX International Market Wrap ANE Solution Last fbange International Market Wrap NBS 4000 0.00 0.00 0.00 900 900 NBS 4000 0.00 0.00 0.00 900 900 US enclose US US Enclose US Enclose US Enclose US Enclose US Enclose Enclose US Enclos	Palladium								Resources dropped 3.7% and Anglo America
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¹ Prices quoted in Australian cents ³ Prices quoted in Canadian cents Commodities are quoted in US\$ Source: Bloomberg, NSX, IJG, JSE

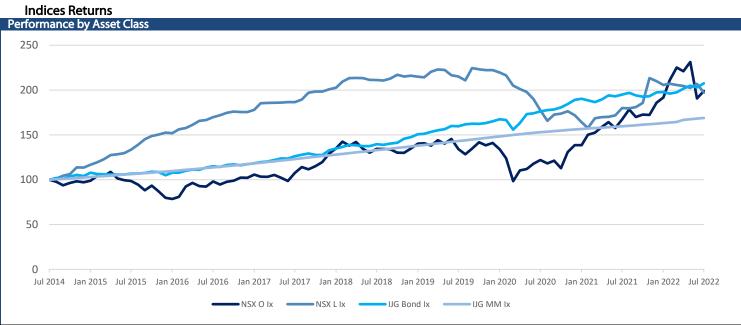
 International News US Manufacturing PMI was revised down 0.1 point to 52.2 in July, as per S&P Global. US Construction Spending fell 1.1% m/m in June, below market, as per US Census Bureau. US ISM Manufacturing fell 0.2 points to 52.8 in July, as per the Institute for Supply Management. Eurozone Manufacturing PMI was revised up 0.2 points to 49.8 in July, as per S&P Global. Eurozone Unemployment Rate remained steady at 6.6% in June, as per Eurostat. UK Manufacturing PMI was revised down 0.1 point to 52.1 in July, as per S&P Global. Germany Retail Sales fell 1.6% m/m and 9.8% y/y in June, as per the Federal Statistical Office. Germany Manufacturing PMI was revised up 0.1 point to 49.3 in July, as per S&P Global. 	 Company News Absa gets IFC loan to drive SA low-cost home mortgages. Absa will get a R2 billion (US\$124 million) loan from the International Finance Corporation to help South Africa's third-largest bank by assets expand its affordable-mortgage business. IFC's first social-sector loan in South Africa is targeted at lower to middle-income households, Adamou Labara, the lender's country head, said in a statement. – Moneyweb Conduit Capital says regulator too quick to act against insurance unit. Conduit Capital's share price plummeted on Monday after its subsidiary, Constantia Insurance, was placed under provisional curatorship by the high court - a decision it argues is premature given that it is in talks with investors about a possible capital injection. Shares in the group slumped as much as 51% before trimming losses marginally to end at 18c by the JSE's close - 49% lower than the previous close. – Business Day eMedia scripts a push into affordable pay-TV in 2023. eMedia Holdings, the free-to-air broadcast group that owns e.tv, eNCA and OpenView, is to make a diversion into the pay-television market dominated by MultiChoice's DStv. In eMedia's just released annual report, CEO Khalik sherriff said the group would contest the pay-TV market from 2023. No further details were given, and, for competitive
 Local News GiPF's pension backed property loans imminent. The Government Institutions Pension Fund (GIPF) says it is ready to roll out Pension Backed Home Loans to help workers secure houses. The new scheme is expected to help Namibia navigate its housing crisis, where the country needs at least half a million new homes to meet rising demand, but 90% of Namibian households are not eligible for mortgages, according to the World Economic Forum. GIPF Chief Executive Officer David Nuyoma told The Brief that only two things are standing between the imminent launch of the scheme – deduction codes from the Ministry of Finance and the signing of a Memorandum of Understanding (MoU) with the government. Nuyoma said once the process is concluded, the fund will fully implement the life changing scheme, which will see many employees securing houses. – The Brief Current regulation allows for pension backed property loans – NAMFISA. The Namibia Financial Institutions Supervisory Authority (NAMFISA) says its current regulations allow pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds to directly lend members a portion of their pension funds avings to buy immovable property or to make renovations to existing immovable property. In addition, the Pension Funds Act allows pension funds to furnish pension-backed guarantees to persons providing housing loans to its members for the same purpose," NAMFISA Chief Executive Officer Kenneth Matomola said on Monday. He said the shelved contentious Financial Institutions and M	 reasons, Sherrif was reluctant at this early juncture to disclose too much. But he told Business Day the envisaged programming would be highly niched and pitched at affordable monthly premiums Business Day MTN's shares lift after it flags profit rise of as much as half. MTN has flagged a profit rise of as much as half for its half year to end-June, putting the company's shares on track for their best day in two weeks on Monday morning. Headline earnings per share (HEPS) are expected to rise by between 40% and 50% from the previous period's R3.87, Africa's largest mobile operator said in a brief update, meaning this profit measure could be almost triple 2019's R1.95. – Business Day Nedbank sees SA clean energy loans jump to R50bn. Nedbank wants to almost double its lending to green energy projects in South Africa over the next two years as it seeks to cement its position as a market leader in funding renewable power projects. The bank's lending toward the government's Renewable Independent Power Producer Program — aimed at boosting privately generated electricity in the nation — may jump to about R50 billion (US\$3 billion) in the "short-to-medium term" from R29 billion, said chief executive officer Mike Brown Moneyweb Standard Bank pioneers SA's first automotive sustainability-linked loan. Standard Bank has successfully led an arrangement for the first SA-based sustainability-linked funding in the automotive sector. The transaction comprises a R6bn sustainability-linked for leading automotive group, Motus Holdings. The R6.8bn funding package highlights the importance of Motus's environmental, social and governance (ESG) journey. – Business Day Thungela flags up to R9bn interim profit as coal prices surge. Thungela flags up to R6bn interim profit as coal prices surge. Thungela flags up to R6bn interim profit as coal prices surge. Headline earnings per share for the six months to end-June are expected to rise to R66.85-R67.45 from R3.05 previou
SA Economic News South Africa has halted tariffs on poultry for 12 months as part of measures to ease food inflation. The government suspended duties on imports of the protein from	SADC Mauritius' Public Sector Debt climbs 3% to 449.3 billion Rupees in Q2.
Brazil, Denmark, Ireland, Poland and Spain because of the impact they may have on the price, according to a gazette published Monday. Chicken is one of the more affordable protein sources in South Africa.	Zimbabwe central bank left its key interest rate unchanged at 200%. Zimbabwe holds benchmark interest rate as it expects monthly inflation to continue to slow during its outlook period, after decelerating for the first time in six months in July, Governor John Mangudya said in statement.

Source: NSX, Bloomberg, CBS, BoN, StatsSA. The Namibian, Namibian Sun, New Era, Republikein, The Observer, Business Day, Fin24, Moneyweb

Overall Index								
Ticker	Shares Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ANE		900	-	-	-	-	900	900
ANM	4,735	57,798	(2,138.0)	(3.57)	(3.57)	(10.37)	82,076	49,125
B2G		5,826	140.0	2.46	2.46	(6.02)	7,308	5,018
CGP		1,101	-	-	-	(14.52)	1,400	1,100
FNB	7,000	3,001	-	-	-	1.73	3,051	2,800
FST	30,984	6,551	(4.0)	(0.06)	(0.06)	7.75	7,775	5,367
IVD		8,953	80.0	0.90	0.90	3.04	10,355	5,383
KFS		1,181	(8.0)	(0.67)	(0.67)	(12.13)	1,500	1,020
LHN	247	245	(20.0)	(7.55)	(7.55)	25.00	300	150
MEP		9,819	119.0	1.23	1.23	44.27	9,819	5,629
MIM		1,476	12.0	0.82	0.82	(22.11)	2,158	1,391
MOC		753	-	-	-	(15.39)	891	700
NAM		70	-	-	-	6.06	70	66
NBK	16,448	21,624	(66.0)	(0.30)	(0.30)	23.43	23,988	15,264
NBS	1,000	4,000	-	-	-	(19.18)	5,100	3,400
NHL		175	-	-	-	-	180	175
OCS	65,000	4,849	(28.0)	(0.57)	(0.57)	(12.69)	6,855	4,450
OMM		1,129	(5.0)	(0.44)	(0.44)	(13.82)	1,450	1,075
ORY	27,955	1,025	-	-	-	14.02	1,144	825
PNH		1,299	-	-	-	1.72	1,300	1,200
SILP		12,790	-	-	-	-	12,790	12,790
SLA	65,111	5,433	(18.0)	(0.33)	(0.33)	(8.61)	7,232	5,086
SNB	43,100	15,911	(88.0)	(0.55)	(0.55)	13.64	18,500	12,313
SNO		434	-	-	-	(29.20)	648	399
SNM		24,298	(64.0)	(0.26)	(0.26)	(7.19)	30,038	22,791
SRH	2,918	22,354	(70.0)	(0.31)	(0.31)	7.23	24,501	15,939
TRW		5,082	(37.0)	(0.72)	(0.72)	(2.74)	6,710	4,610
πο		38	-	-	-	(69.60)	260	37
VKN		1,424	4.0	0.28	0.28	15.12	1,455	1,068

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		35,162	1095.00	3.21	3.21	17.64	45,316	24,295
ENXGLD		28,351	-150.00	-0.53	-0.53	0.43	31,000	22,000
ENXPLT		14,592	125.00	0.86	0.86	-2.10	17,472	13,097
NFNAMA		1,694	-10.00	-0.59	-0.59	2.42	1,729	1,597
NGNGLD		27,146	-137.00	-0.50	-0.50	0.51	29,180	23,647
NGNPLD		35,306	1386.00	4.09	4.09	18.14	45,671	24,241
NGNPLT		14,432	147.00	1.03	1.03	-2.21	17,347	13,075
SXNEMG		4,832	-15.00	-0.31	-0.31	-15.03	7,352	4,582
SXNWDM		6,339	-8.00	-0.13	-0.13	-10.92	14,215	5,545
SXNNDQ		12,133	29.00	0.24	0.24	-18.10	15,140	7,448
SXN500		7,026	6.00	0.09	0.09	-9.87	14,597	6,019



* Based to 100

Namibian Bonds Government Bonds	YTM	Benchmark	Benchmark YTM	Premium Last Trade	All-In-Price	Clean Price	Modified Duration
GC23	8.150	R2023	6.950	120	103.378	100.760	1.098
GC24	8.510	R186	9.060	-55	106.997	103.890	1.893
GC25	8.830	R186	9.060	-23	101.707	99.192	2.312
GC26	8.940	R186	9.060	-12	101.124	98.608	3.038
GC27	9.800	R186	9.060	74	93.989	93.616	3.618
GC28	10.783	R2030	10.450	33	92.344	89.829	4.497
GC30	11.710	R2030	10.450	126	82.243	81.870	5.219
GC32	11.607	R213	10.765	84	87.681	85.018	5.859
GC35	12.451	R209	11.150	130	81.685	81.242	6.674
GC37	12.927	R2037	11.320	161	77.986	77.544	6.904
GC40	12.676	R214	11.290	139	82.586	79.686	7.102
GC43	13.718	R2044	11.385	233	75.025	74.559	7.084
GC45	13.948	R2044	11.385	256	72.390	71.931	7.073
GC48	14.068	R2048	11.330	274	74.812	71.853	6.834
GC50	14.508	R2048	11.330	318	71.694	71.217	6.871
GI22	0.000	0.10		0.0	139.265	137.828	0.205
GI25	3.940				136.545	136.303	2.763
GI27	3.900				108.221	106.961	4.608
GI29	4.850				119.085	118.831	5.518
GI33	6.524				100.437	98.881	8.002
GI36	7.283				88.059	87.809	9.412
Eurobond 2	10.212	10YUSBond	2.573	764	87.958	86.587	2.814
	8.190	R2023	6.950	124	101.689	99.946	0.284
NAM01	8.550	R2023	6.950	124	101.689	101.401	0.284
NAM03							
NAM04	10.840	R186	9.060	178	99.037	98.950	3.180
Corporate Bonds – Fix	8.450	R2023	6.950	150	99.608	100.050	0.045
BWFH22 BWFK22	8.490	R2023	6.950	150	102.324	100.356	0.045
	8.250	R2023	6.950	134	102.524	100.330	1.055
BWFi23	7.600	R2023	6.950	65	102.951	101.545	1.233
DBN23		GC24	8.510	92		101.545	1.235
NEDNAM01	9.430			92	102.481		
NEDX2030	8.945	GC25	8.830	12	107.111	102.804	2.150
Corporate Bonds – Flo		2 maanth UDAD	5 725	103	00 6 5 0	00.051	0.045
BWJh22	7.545	3 month JIBAR	5.725	182	99.650	99.951	0.045
BWJK22	7.595	3 month JIBAR	5.725	187	99.586	99.956	0.053
BWJL23	6.675	3 month JIBAR	5.725	95	100.882	99.922	0.084
BWJi24	7.225	3 month JIBAR	5.725	150	100.447	99.877	0.158
BWJL25	6.885	3 month JIBAR	5.725	116	100.916	99.921	0.084
BWJf26S	7.225	3 month JIBAR	5.725	150	100.972	99.921	0.084
BWJ1e27	7.875	3 month JIBAR	5.725	215	99.613	99.942	0.048
BWJ2e27	5.725	3 month JIBAR	5.725	0	99.718	99.942	0.048
FNBJ25S	7.175	3 month JIBAR	5.725	145	100.572	99.885	0.139
FNBJ27S	7.455	3 month JIBAR	5.725	173	100.601	99.885	0.139
ORYJ22	7.925	3 month JIBAR	5.725	220	101.367	99.951	0.050
SBKN23	6.605	3 month JIBAR	5.725	88	100.103	99.994	0.227
SBNA24	6.875	3 month JIBAR	5.725	115	101.085	99.943	0.061
SBNA26	7.095	3 month JIBAR	5.725	137	101.107	99.940	0.064
SBKN26	7.165	3 month JIBAR	5.725	144	100.208	99.869	0.193
LHN01	9.275	3 month JIBAR	5.725	355	101.622	99.941	0.042
LHN02	8.525	3 month JIBAR	5.725	280	100.582	99.876	2.531
PNJ24	8.725	3 month JIBAR	5.725	300	100.845	99.887	0.125
PNJ26	8.975	3 month JIBAR	5.725	325	100.874	99.887	0.125
NEDNAM02	8.475	3 month JIBAR	5.725	275	100.000	100.000	0.000
NEDJ2028	8.475	3 month JIBAR	5.725	275	101.291	99.930	0.072





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