Daily market 360

Tuesday, 15 September 2026

Local Overview

Quick view | Selected indices

Cumulative returns

Indicator	Close Price	1d%	1m%	ytd%	1y%	5y%
All Share	113536.30	-1.41	-0.46	-1.98	8.69	76.57
Top 40	106066.19	-1.57	-0.16	-1.77	9.31	82.51
Financial 15	25530.54	-1.00	-3.55	2.64	17.31	79.43
Industrial 25	120144.33	0.35	-3.30	-13.28	-13.74	48.45
Resource 10	130427.63	-3.51	6.05	5.48	30.95	115.44
Mid Cap	105306.36	-0.85	-0.47	-7.21	4.40	39.64
Small Cap	105432.48	0.13	-1.14	-2.33	7.54	76.31
ALBI	1417.04	-0.67	-2.13	2.73	13.32	73.35
STeFI	670.27	0.06	0.58	4.82	7.02	40.57

Click here for the full list of indicators

Click here for the closing prices of all JSE listed companies

Equities | JSE All Share Companies

Cumulative returns

Best One-Day % Performers	Code	Close Price	1d%	1m%	ytd%	1y%
Omnia Holdings Ltd	OMN	12464	5.92	24.52	58.17	70.16
Karooooo Ltd	KRO	105334	4.38	6.40	34.61	13.14
British American Tob plc	BTI	92987	3.77	1.09	-1.21	-5.27
Grindrod Ltd	GND	2652	3.15	10.36	56.00	67.95
Anheuser-Busch InBev SA NV	ANH	129696	3.10	1.01	21.15	27.15

Worst One-Day % Performers	Code	Close Price	1d%	1m%	ytd%	1y%
ASP ISOTOPES INC.	ISO	5358	-7.81	-24.03	-45.05	-65.13
Sibanye Stillwater Ltd	SSW	4784	-6.42	10.00	-20.93	25.14
Northam Platinum Hldgs Ltd	NPH	30286	-5.94	16.17	-10.16	34.03
DRD Gold Ltd	DRD	4123	-5.82	4.06	-21.26	6.26
KAP Limited	KAP	264	-5.71	-7.69	37.50	56.21

Market updates | Selected headlines

South African equities retreated on Monday as global energy and interest-rate concerns dominated a session lacking major domestic economic releases. The JSE All Share fell 1.41% to 113,536.30, while the Top 40 declined 1.57% to 106,066.19. Precious Metals & Mining, Basic Materials, Retailers and Banks led losses, offset partly by gains in Beverages, Chemicals and Industrial Transportation. National Treasury also announced a three-year intervention to stabilise Johannesburg, while the Reserve Bank highlighted the economic cost of reduced domestic refining capacity.

Oil advanced on Tuesday as attacks on Saudi Arabian energy infrastructure intensified concerns over global supply. The East-West pipeline remained offline after disruptions, threatening a route capable of moving roughly 4 million barrels per day around the Strait of Hormuz. Vessel traffic through the Strait also fell below recent averages, adding to fears of tightening exports. Fresh Houthi attacks and postponed Gulf-Iran discussions compounded geopolitical uncertainty. Gold traded higher as investors sought defensive assets amid escalating regional tensions and volatile global financial conditions.

The rand weakened sharply on Monday as rising oil prices increased concern over South Africa's imported-energy exposure and investors positioned for this week's Federal Reserve meeting. The dollar remained firm near a two-week high on Tuesday, supported by higher Treasury yields and expectations of tighter US monetary policy. The dollar index stood at 99.55. Risk aversion also favoured the greenback as AI-linked equities weakened globally. The yen slipped around 0.2% from a seven-month high ahead of an anticipated Bank of Japan rate increase on Friday.

In the news | Selected items

Omnia Draws R134.50-a-Share Offer from Solar SA

Solar SA Investments has made a firm cash proposal to acquire Omnia through a scheme of arrangement, offering R134.50 per eligible share. The offer values Omnia's issued share capital at approximately R21.83 billion and would place the group under Solar Industries India if completed. The consideration stands 30.98% above Omnia's 10 September closing price of R102.69 and 35.73% above the adjusted 30-day VWAP of R99.09. Implementation would result in Omnia leaving both the JSE and A2X. The transaction remains subject to shareholder and regulatory approvals, while holders representing approximately 19.57% of issued shares have indicated support under the current terms.

Pepkor Keeps Revenue Growth Moving as Platforms Expand

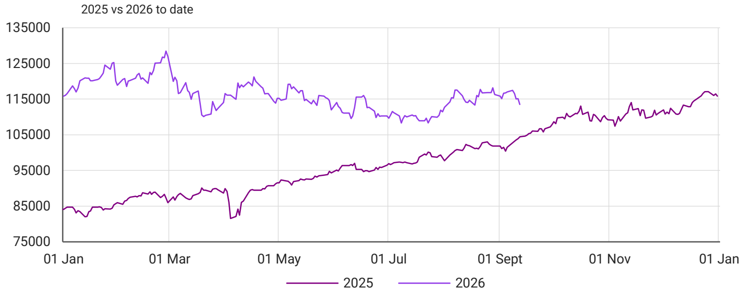
Pepkor maintained positive trading momentum through the ten months ended 31 July 2026, reporting revenue growth of 11.9%, or 7.3% excluding acquisitions. Like-for-like sales increased 3.1%, while the retailer said it continued to gain market share and improved its gross profit margin. Expansion remained underway across FoneYam and Abacus, with the PlusB banking proposition progressing according to plan and within target. Flash throughput rose 19.0% during the period. Pepkor also unlocked R2 billion of capital through a sale-and-leaseback transaction and confirmed its Chief Operating Officer succession as management approached the close of the 2026 financial year and continued executing its strategic priorities.

Expected Local Corporate Calendar

Company	Code	Type	Date
Attacq	ATT	Final	15 Sept
Pan African Resources plc	PAN	Final	16 Sept
Supermarket Income REIT plc	SRI	Final	16 Sept
Momentum Group	MTM	Final	17 Sept
aReit Prop	APO	Final	17 Sept

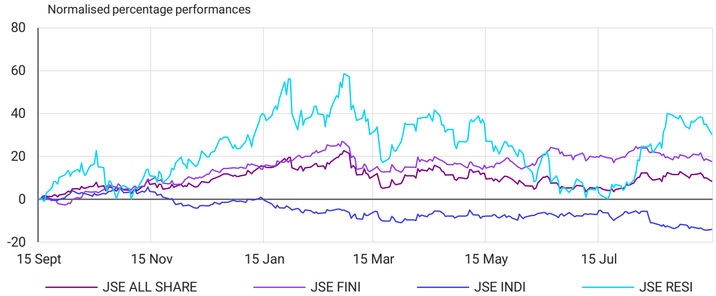
JSE All Share Index

2025 vs 2026 to date



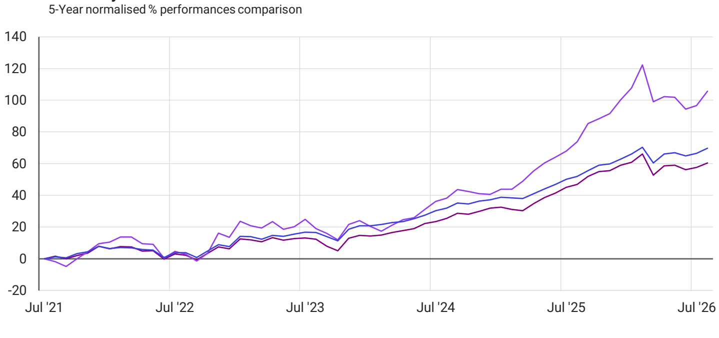
Local Indices

Normalised percentage performances



Discovery Balanced Fund return

5-Year normalised % performances comparison



Fund data last updated | Jan 2026

Discovery funds | Selected funds

Annualised returns

Fund		1y%	3y%	5y%
Discovery Balanced	Download Factsheet	6.42	12.69	10.01
Discovery Moderate Balanced	Download Factsheet	6.85	12.18	9.38
Discovery Cautious Balanced	Download Factsheet	7.48	11.59	8.59
Discovery Diversified Income	Download Factsheet	9.65	10.09	8.62
Discovery Equity	Download Factsheet	6.80	16.07	11.96
Discovery Flexible Property	Download Factsheet	15.03	22.99	14.17
Discovery Money Market	Download Factsheet	6.91	7.69	7.02

Did you know?

Omnia has been listed on the JSE since 1980, giving it more than four decades of public-market history.

Disclaimer: 1y, 3y, 5y figures are annualized. All the tables and/or figures are sourced from Iress and are shown net of fund management fees as at close of business on 14/09/2026

Daily market 360

Tuesday, 15 September 2026

Global Overview

Quick view | Selected indices

Cumulative returns

Indicator		Close Price	1d%	1m%	ytd%	1y%	5y%
Dow Jones		52421.20	-0.29	-2.44	9.07	14.37	51.60
S&P 500		7619.98	-0.48	-2.13	11.31	15.73	71.50
Eurostoxx 50		6257.30	-1.03	-4.28	8.04	16.07	49.54
FTSE		10697.57	0.44	-0.49	7.71	15.23	52.08
Nikkei 225		63492.99	-0.81	-7.60	26.13	41.83	107.02
Brent Crude		106.18	1.69	19.81	74.32	58.76	43.72
Gold		4298.47	-1.15	-1.75	-0.46	17.99	138.19
USDZAR	15.48*	16.26	0.82	0.41	-1.87	-6.52	13.45
GBPZAR	20.9*	21.94	0.54	0.17	-1.62	-6.94	10.90
EURZAR	17.88*	18.77	0.48	0.33	-3.58	-7.98	11.02
Bitcoin		79632.51	2.33	25.88	-9.67	-31.96	70.81
Ethereum		2572.72	2.11	37.73	-14.10	-44.68	-23.62

* Discovery Currency Enhancer Rate - Click here to find out more

Expected Economic Calendar

Selected items

Time	Zone	Today's expected releases and events	Exp.	Prev.
08:00	UK	Claimant Count Change	8.3K	-11.0K
08:00	UK	Average Earnings Index 3m/y	3.90%	4.10%
11:00	EU	Trade Balance	3.7B	1.8B
22:30	US	API Weekly Statistical Bulletin	---	---
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Time	Zone	Last session's releases	Exp.	Act.
15:30	UK	CB Leading Index m/m	---	-0.10%
17:15	EU	ECB President Lagarde Speaks	---	---
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Interest rates | Selected international items

Region	Date Changed	Current Rate	Previous Rate
United States	Dec '25	3.50% - 3.75%	3.75% - 4.00%
United Kingdom	Aug '24	4.00%	4.25%
European	Sep ' 26	2.65%	2.40%
SA Repo Rate	May '26	7.00%	6.75%
SA Prime Rate	May '26	10.50%	10.25%

10-Year Bonds

Region	Yield	One day	One month	One year
United States	5.01%	4	31	94
United Kingdom	5.37%	2	33	70
Germany	3.51%	1	31	80
Japan	3.00%	3	13	142
South African 10Y	9.00%	9	35	-21

Market updates | Selected headlines

European shares declined on Monday as technology weakness, higher bond yields and renewed energy inflation concerns weighed on sentiment. The STOXX 600 fell 0.5% to 635.99, although the FTSE and Switzerland's SMI advanced 0.4% and 0.8%, respectively. ECB policymakers warned that rising oil and natural-gas prices could keep inflation above recently raised projections. Healthcare outperformed, gaining 2.7%, with GSK up 4.7% after positive lung-cancer trial results. Hugo Boss also announced chairman Stephan Sturm will step down as Frasers presses for control.

Wall Street closed lower on Monday as semiconductor and AI-related shares sold off after leading artificial-intelligence executives urged slower development. Nvidia and other chipmakers were among the major laggards. The 10-year Treasury yield briefly exceeded 5% for the first time since 2023, intensifying valuation pressure ahead of Wednesday's Federal Reserve decision. Traders assigned a 90% probability to a 25-basis-point rate increase as elevated oil prices complicated the inflation outlook. Bank of America fell 5.1% after warning third-quarter investment-banking fees could decline by at least 10%.

Asian markets traded cautiously on Tuesday as Middle East risks, AI concerns and looming central-bank decisions constrained risk appetite. China's industrial output grew 5.2% year on year in August, beating expectations for 4.8%, while retail sales rose only 0.4% and missed forecasts. Fixed-asset investment fell 7.2% over the first eight months, while new-home prices declined 0.1%, extending the property downturn. In Japan, attention remained on Friday's Bank of Japan meeting, where a 25-basis-point increase to 1.25% is widely expected alongside signals of further tightening.

In the news | Selected items

Realty Income Takes Its Private-Capital Strategy into Europe

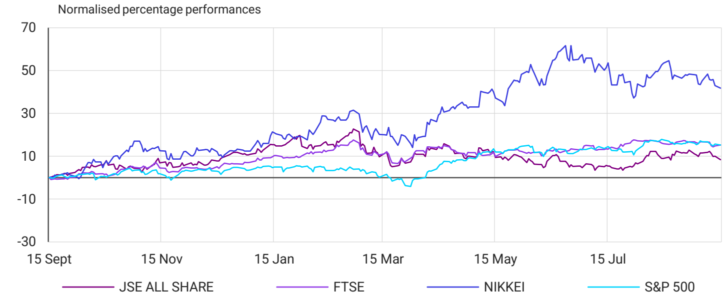
Realty Income and KKR are extending their partnership into Europe through a new euro-denominated joint venture built around an existing portfolio of European net lease properties. Capital accounts advised by KKR will invest €528 million for a 49% equity interest, while Realty Income will retain 51% and continue managing the assets through its European operating platform. The portfolio spans four markets and a diversified mix of industries and tenants. Management said the structure broadens Realty Income's access to private capital while supporting continued regional expansion. The transaction is expected to close on 30 September 2026, subject to customary conditions, with Realty Income maintaining operational responsibility for the portfolio after completion.

Comcast and Paramount Skydance Reassess SkyShowtime's European Future

Comcast's NBC and Paramount Skydance are reviewing the future of SkyShowtime, their European streaming joint venture, as competitive conditions pressure the platform. The board has informed CEO Monty Sarhan that strategic alternatives are being considered, including a potential shutdown. Launched in 2022, SkyShowtime operates across 22 European markets, including Spain, Portugal, Denmark and Sweden, offering film and television content from the two media groups. Sarhan subsequently communicated the review to employees and acknowledged the uncertainty surrounding the process. No final decision has been announced, leaving the companies to assess whether the platform's current structure remains viable as streaming operators across Europe continue confronting intense competition and challenging economics at scale.

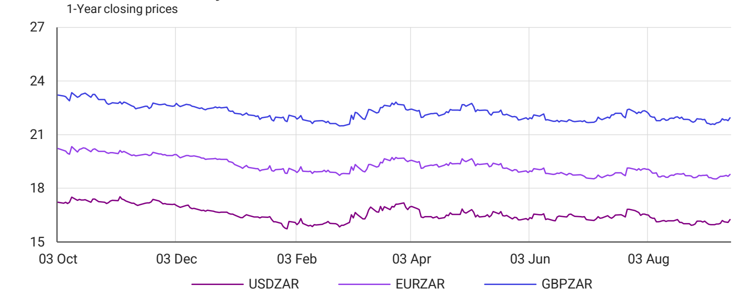
JSE All Share Index vs Selected Global Indicators

Normalised percentage performances



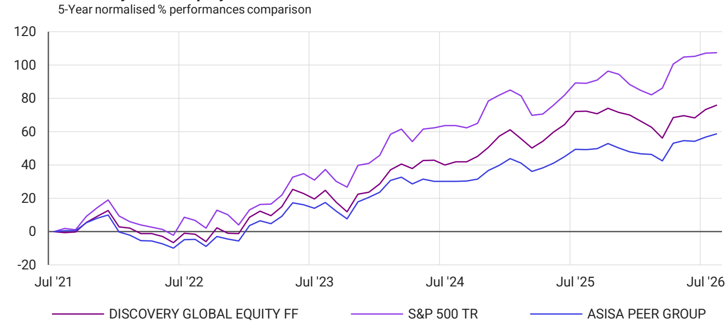
Rand vs Selected Majors

1-Year closing prices



Discovery Global Equity Feeder Fund Return

5-Year normalised % performances comparison



Discovery funds | Selected funds

Annualised returns

Fund		1y%	3y%	5y%
Discovery Global Multi-Asset Fund	Download Factsheet	-1.82	4.24	4.40
Discovery Global Equity FF	Download Factsheet	1.09	12.47	12.32
Discovery Global Real Estate Secs FF	Download Factsheet	-6.11	-0.89	-0.08
Discovery Global Value Equity FF	Download Factsheet	10.86	12.70	15.28

Did you know?

Realty Income was founded in 1969 by William and Joan Clark after acquiring a Taco Bell property directly from Taco Bell founder Glen Bell.

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Daily market 360

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