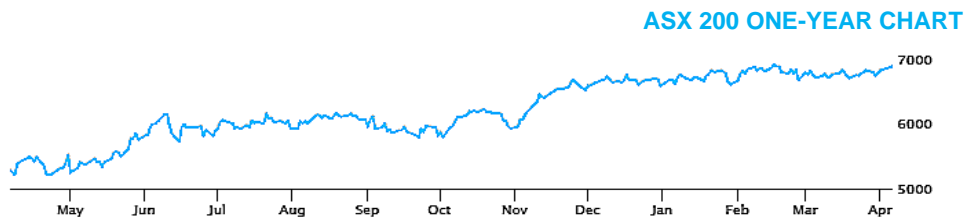


HEADLINES

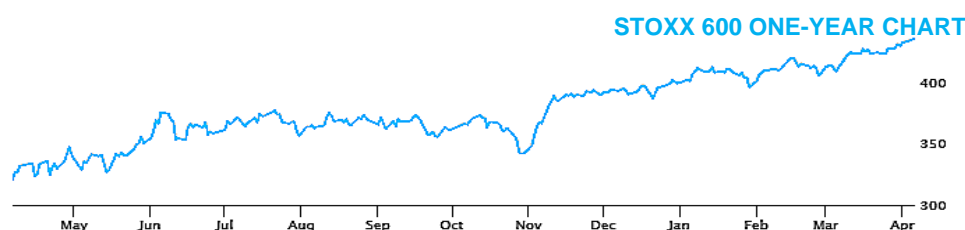
AUSTRALIAN MARKET

Australian shares edged lower on Friday as investors mulled the country's COVID vaccination timeline after the government decided to make Pfizer the preferred vaccine following safety concerns over AstraZeneca's vaccine for people aged under 50. The **S&P/ASX 200** inched 3.6 points or 0.05% lower to 6,995.20. **Consumer staples** (-1.1%) and **health care** (-0.8%) led the declines during the session, while **IT** and **property stocks** were among the best performers, adding 0.7% each. The **miners** were 0.2% lower as **BHP**, **Fortescue**, and **Rio Tinto** slipped between 0.3–0.8%. Meanwhile, **gold stocks** gained 1.7% after the price of the precious metal rose to a five week high. **Financials** (0.1%) crept higher as **NAB** and **Westpac** improved by 0.3% and 0.2% respectively. **ANZ** and **Commonwealth Bank** were little changed, while **Macquarie** (0.8%) briefly notched a high of \$155.94 before closing at \$154.80. In company news, **Afterpay** climbed 1.2% after the buy now-pay later company said its underlying stake in in Afterpay US had risen to around 91%. **News Corp** (1.2%) was higher after increasing the size of its private offering of Senior Notes from \$750 million to \$1 billion. Elsewhere, **CSL** lost 1% as it reiterated its commitment to meeting contracted arrangements with the Australian government and AstraZeneca for locally produced AstraZeneca COVID-19 vaccines. Travel-related stocks **Corporate Travel Management**, **Flight Centre**, **Sydney Airport**, and **Webjet** tumbled by 1.6–3%. **Qantas** managed a 0.6% improvement. **Air New Zealand** rose 2.1% as it announced it will defer its planned capital raise and increase its loan facility with the New Zealand government by NZ\$600 million. The RBA's Financial Stability Review reinforced recent commentary that the central bank was closely monitoring the surge in the property market. On to data, the Ai Group Services Index rose from 55.8 to 58.7 in March. A reading over 50 indicates expansion in activity. Over in China, inflation rose at an annual rate of 0.4% (forecast: 0.3%). Producer prices were up 4.4% over the same period (forecast: 3.5%). For the week, the **benchmark index** advanced 2.4%.



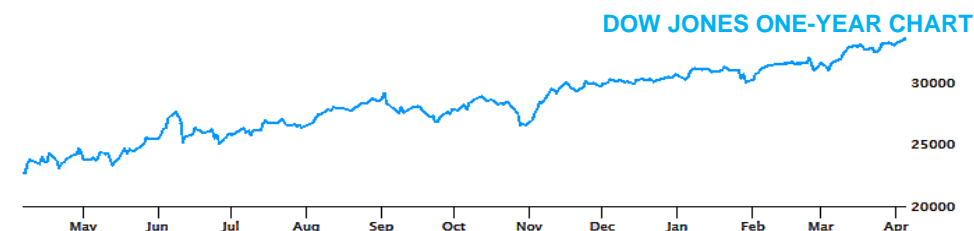
EUROPEAN MARKETS

European shares closed lower on Friday but marked its longest weekly streak since November 2019. The pan-European **STOXX 600** added 0.09% to 437.23 as **health care stocks** rose 0.7%, while **telecom shares** fell by just as much. Germany's **DAX** rose 0.2% to 15,234.16. In the UK, the **FTSE 100** fell 0.4% to 6,915.75. In terms of individual share price action, **Airbus** (0.3%) was higher after the plane maker reported slightly better deliveries in the first quarter. Travel agency company **TUI** slipped 2.1% after it said it was raising 350 million euros through the issuance of convertible bonds to boost its finances and repay debt. **British American Tobacco** (-2.5%) fell following a downgrade to 'neutral' at JPMorgan, while German lubricant manufacturer **Fuchs Petrolub** climbed 4.8% after Baader Bank upgraded the stock to 'buy'. Elsewhere, Italy's **Atlantia** rose 0.6% after Spanish infrastructure group **ACS** (-0.8%) expressed interest in taking a stake in the former's motorway unit. In the way of economic data, Germany's industrial production slipped 1.6% in February (forecast: 1.5%). For the week, the **STOXX 600**, **DAX**, and **FTSE 100** gained 1.1%, 0.8%, and 2.6% respectively.

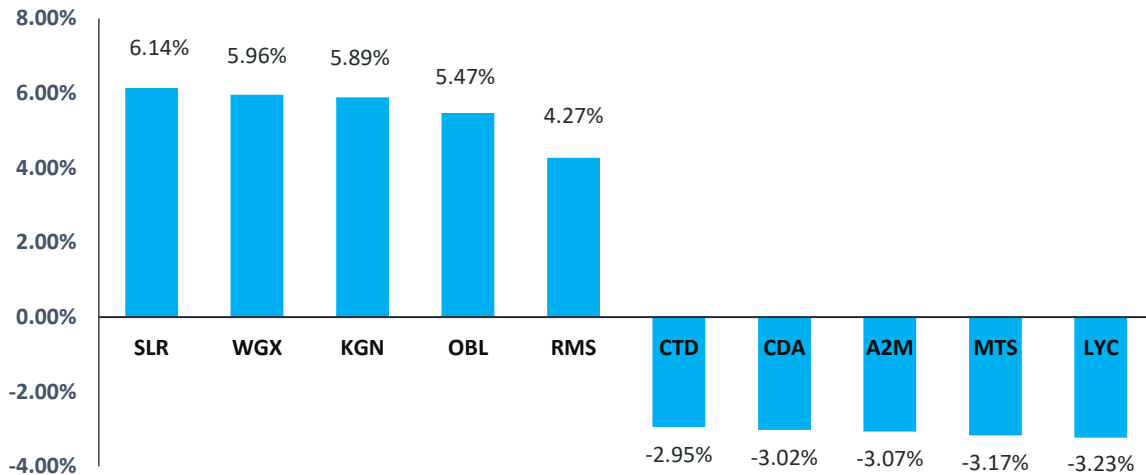


US MARKETS

The S&P 500 and the Dow closed at record highs on Friday. The **S&P 500** gained 0.8% to 4,128.80 as eight of the 11 major sectors advanced, led by **healthcare** and **consumer discretionary stocks** which firmed by 1.2% each. **Energy stocks** (-0.5%) led the declines. The **Dow** rose 0.9% to 33,800.60 as **Salesforce**, **UnitedHealth**, and **Honeywell**, which received an upgrade at Deutsche Bank to 'buy', added more than 3% each. **Boeing** slipped 1% after US airlines temporarily grounded over 60 737 MAX jets after the plane maker asked 16 carriers who operate the jet to address an electrical power system issue in the aircraft. The **Nasdaq** added 0.5% to 13,900.19 as **Apple** and **Amazon** added more than 2% each. **Facebook** shares slipped 0.2%. Elsewhere, retailer **Levi Strauss** improved by 2.6% after its profit and revenue numbers exceeded expectations. Earnings season will kick into high gear this week with **Goldman Sachs**, **JPMorgan**, and **Wells Fargo** scheduled to report their results on Wednesday. On the data front, US producer prices rose at an annual rate of 4.2% last month (forecast: 3.8%). Core producer prices were up 3.1% (forecast: 2.7%). Wholesale inventories lifted 0.6% in February (forecast: 0.5%). Over the course of the week, the **S&P 500**, **Dow**, and **Nasdaq** rallied 2.7%, 2%, and 3.1% respectively.



TOP 5 S&P/ASX200 MOVERS



MARKET DATA

INDICES	CLOSE	CHANGE	FX	CLOSE	CHANGE	COMMODITIES	PRICE (US\$)	CHANGE	BONDS	RATES
ASX 200	6,995.20	-0.05%	AUD/USD	0.7625	0.10%	GOLD (OZ)	\$1,742.08	-0.79%	AU 2 YEAR	0.06
ASX FUTURES	6,980.00	0.09%	AUD/NZD	1.0832	0.06%	SILVER (OZ)	\$25.26	-0.01%	AU 5 YEAR	0.83
DOW JONES	33,800.60	0.89%	AUD/EUR	0.6406	0.09%	PLATINUM (OZ)	\$1,198.50	-2.54%	AU 10 YEAR	1.80
S&P 500	4,128.80	0.77%	AUD/GBP	0.5560	0.09%	BRENT CRUDE (BBL)	\$63.27	0.51%	AU 15 YEAR	2.21
FTSE 100	6,915.75	-0.38%	AUD/JPY	83.6430	0.10%	WTI CRUDE (BBL)	\$59.51	0.30%	US 2 YEAR	0.15
NIKKEI 225	29,768.06	0.20%	EUR/USD	1.1898	-0.02%	NATURAL GAS (MMBtu)	\$2.56	1.31%	US 5 YEAR	0.86
HANG SENG	28,698.80	-1.07%	GBP/USD	1.3712	0.06%	COPPER (LB)	\$4.06	-1.09%	US 10 YEAR	1.66
VIX	16.69	-1.53%	USD/JPY	109.7020	0.05%	IRON ORE (MT)	\$173.54	0.30%	US 30 YEAR	2.33

as at approx. 9:58 am

WEEKLY ECONOMIC CALENDAR

MONDAY	12 TH APR	-	EU – Retail Sales YoY (FEB)
MONDAY	12 TH APR	-	US – Monthly Budget Statement (MAR)
TUESDAY	13 TH APR	-	AU – HIA New Home Sales MoM (MAR), NAB Business Confidence (MAR)
TUESDAY	13 TH APR	-	CHN – Balance of Trade (MAR)
TUESDAY	13 TH APR	-	UK – GDP YoY (FEB)
TUESDAY	13 TH APR	-	EU – ZEW Economic Sentiment Index (APR)
TUESDAY	13 TH APR	-	US – Inflation Rate YoY (MAR), NFIB Business Optimism Index (MAR)
WEDNESDAY	14 TH APR	-	AU – Westpac Consumer Confidence Index (APR)
WEDNESDAY	14 TH APR	-	EU – Industrial Production YoY (FEB)
WEDNESDAY	14 TH APR	-	US – MBA Mortgage Applications (09/APR), Fed Beige Book
THURSDAY	15 TH APR	-	AU – Unemployment Rate (MAR), Consumer Inflation Expectations (APR)
THURSDAY	15 TH APR	-	US – Retail Sales MoM (MAR), Initial Jobless Claims (10/APR), Industrial Production MoM (MAR)
FRIDAY	16 TH APR	-	CHN – GDP Growth Rate YoY (Q1), Retail Sales YoY, Unemployment Rate (MAR)
FRIDAY	16 TH APR	-	EU – Core Inflation Rate YoY Final (MAR)
FRIDAY	16 TH APR	-	US – Building Permits MoM, Housing Starts MoM (MAR), Michigan Consumer Sentiment Prel. (APR)

TODAY'S CORPORATE ACTIONS

BKW	QUOTED: Ex Dividend
CLX	QUOTED: Ex Dividend
DEL	NEW LISTING: [DEL] DELOREANCP FPO
GSBG23	QUOTED: Ex Interest
GSBG24	QUOTED: Ex Interest
GSBG25	QUOTED: Ex Interest
GSBG26	QUOTED: Ex Interest
GSBG27	QUOTED: Ex Interest
GSBG29	QUOTED: Ex Interest
GSBG33	QUOTED: Ex Interest
GSBG37	QUOTED: Ex Interest
MATN	NEW LISTING: [MATN] MATSA RES DEF
MATO	NEW LISTING: [MATO] MATSA RES OPTAPR23D
PTR	QUOTED: Ex Bonus Issue
SRL	RENAME: [CLQ] CLEANTEQ FPO NEW: [SRL] SUNRISE FPO
WFLO	CHANGE OF DESC: WELLFULLYL OPTMAR23D NEW: WELLFULLYL OPT MAR23

Important Disclaimer: This may affect your legal rights: This document has been prepared without consideration of any specific client's financial situation, particular needs and investment objectives. While this document is based on the information from sources which are considered reliable, no responsibility is accepted by Third Party Platform Pty Ltd ABN 74 121 227 905 AFSL 314 341 trading as Desktop Broker, its directors, employees and consultants for its accuracy and completeness which are not guaranteed and no warranty of accuracy, completeness or reliability is given or implied and no responsibility for any loss or damage arising in any way for any representation, act or omission is accepted. Nor does Desktop Broker accept any responsibility to inform you of any matter that subsequently comes to its notice, which may affect any of the information contained in this document. This document is a private communication to advisors and is not intended for public circulation or for the use of any third party. This is general investment advice only and does not constitute advice to any person.

Disclosure of Interest: Desktop Broker receives commission from dealing in securities and its associates may hold shares in the companies contained in this report.