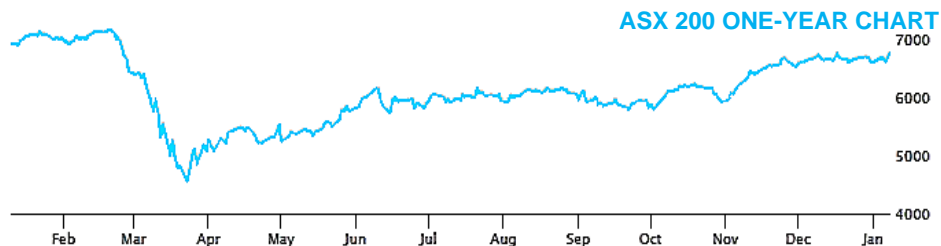


HEADLINES

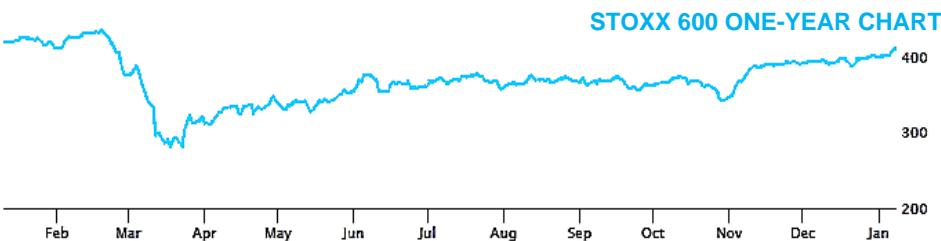
AUSTRALIAN MARKET

Australian shares advanced for a third straight session, taking its lead from a strong overnight performance on Wall Street as US President Joe Biden was sworn into office. The **S&P/ASX 200** gained 53.5 points or 0.8% to 6,823.70, its highest close since February last year, with **financial** (1.1%) and **tech** (2.7%) stocks outperforming. Buy now-pay later stocks **Afterpay** and **Zip Co** jumped 5.7% and 23.1% to lead gains on the IT sub-index. The latter released a trading update where it reported a record quarterly revenue and transaction volume of \$102 million (+88%) and \$1.6 billion (+103%) respectively. Among the Big Four banks, **NAB** stood out a 1.6% improvement, while **ANZ**, **Commonwealth Bank**, and **Westpac** added 1.1% each. The **miners** and **gold** stocks were also up 1.1% each. **BHP** and **Rio Tinto** rose at least 1.6% each, while **Fortescue** added 0.2%. Staying in the sector, gold miners **Northern Star** (1.6%) and **Saracen** (2%) along with graphite miner **Syrah Resources** (7.9%) were all higher after strong trading updates, while **South32** offered a mixed update sending its shares 0.4% lower. In the **energy** space (-0.5%), **Woodside** was down 1.6%, while **Santos** finished flat after its updates. **Cleanaway Waste** tumbled 8.5% to the bottom of the benchmark index on news that its chief executive is stepping down. Data from the ABS showed that unemployment rate slipped from 6.8% to 6.6% (forecast: 6.7%) as employment rose by 50,000, as expected, in December. The participation rate was up 0.1% to 66.2%.



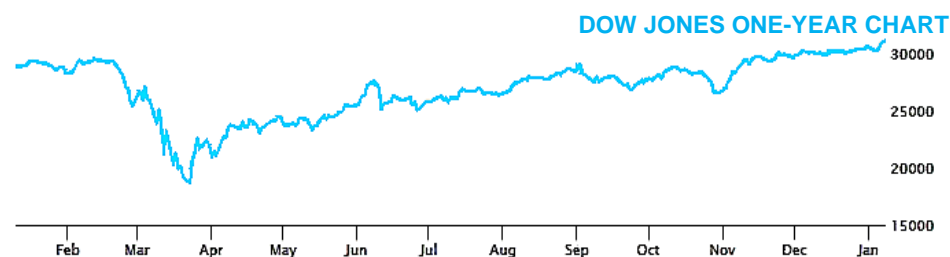
EUROPEAN MARKETS

European shares were little changed on Thursday as oil and real estate stocks weighed. The European Central Bank kept rates unchanged during its policy meeting but warned that the new surge in cases and ensuing restriction would dampen activity in the near term and said that it is prepared to provide more support if needed. The pan-European **STOXX 600** was flat at 410.89. **Tech shares** (1.6%) led the gains, while **energy** (-1.3%) and **real estate** (-1.5%) lagged the most. In the region, Germany's **DAX** slipped 0.1% to 13,906.67, while the UK's **FTSE 100** fell 0.4% to 6,715.42. On to individual share price action, Swiss e-commerce pharmacy **Zur Rose Group** (8.8%), Spanish lender **Bankinter** (4.3%), and British software maker **Sage Group** (4.9%) rose following well-received results. Energy majors **BP** (-3.1%), **Royal Dutch Shell** (-2.4%), and **Total** (-2.3%) fell as oil prices slipped after data showed an unexpected increase in US crude inventories. Meanwhile, losses in shopping centre operators **Klépierre** (-6.5%) and **Unibail-Rodamco-Westfield** (-8.4%) dragged the real estate index lower. Elsewhere, shares in wind turbine maker **Vestas**, renewable energy group **Siemens Gamesa**, and offshore wind group **Ørsted** advanced 1.4–3.9% after the US President signed a number of executive orders including the US' return to the international Paris Agreement to fight climate change. In deal-making news, **IG Group** was down 8.6% after the derivatives trading company announced plans to buy US online trading platform Tastytrade for US\$1 billion.

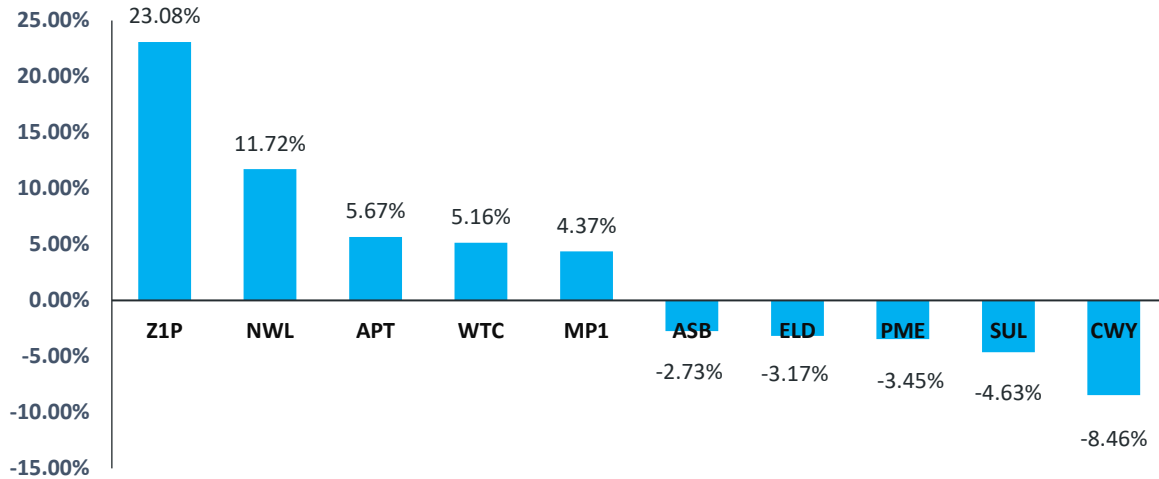


US MARKETS

The S&P 500 and Nasdaq closed at record highs on Thursday as investors shifted their focus to earnings from the major tech companies next week. The **S&P 500** was up 0.03% to 3,853.07 with a 1.3% rise in the **technology sector** helping offset losses in in **energy** (3.4%), which lagged amid news that Biden revoked the Keystone XL oil pipeline project's presidential permit. **Financials** (-1.1%), and **materials** (-1.5%) also dragged on the S&P 500. The **Dow** was little changed, dropping 0.04% to 31,176.01, pressured by **Chevron** (-3.5%), **Walgreens** (-2.1%), and **Boeing** (-1.9%). The **Nasdaq** rose 0.6% to 13,530.92. **Alphabet** (0.2%), **Amazon** (1.3%), and **Apple** (3.7%) were all higher ahead of next week's earnings results, while **Intel** shares surged 6.5% after forecasting first-quarter earnings and revenue above expectations. Staying on earnings news, **United Airlines** (-5.7%) tumbled after the company posted its fourth straight quarterly loss and said it aims to cut approximately US\$2 billion of annual costs through 2023. **Ford Motor** advanced 6.2%, adding to recent gains, after Deutsche Bank named the company a short-term buy on Wednesday. On the data front, initial claims for state unemployment benefits fell 26,000 to a seasonally adjusted 900,000 for the week ended Jan. 16 (forecast: 910,000). Building permits rose 4.5% to 1.709 million in December (forecast: 1.6 million), while housing starts rose 5.8% to 1.669 million (forecast: 1.56 million). The Philadelphia Fed Manufacturing Index lifted from 9.1 to 26.5 in January (forecast: 12).



TOP 5 S&P/ASX200 MOVERS



MARKET DATA

INDICES	CLOSE	CHANGE	FX	CLOSE	CHANGE	COMMODITIES	PRICE (US\$)	CHANGE	BONDS	RATES
ASX 200	6,823.70	0.79%	AUD/USD	0.7764	0.24%	GOLD (OZ)	\$1,870.40	-0.03%	AU 2 YEAR	0.09
ASX FUTURES	6,754.00	-0.27%	AUD/NZD	1.0756	-0.40%	SILVER (OZ)	\$25.95	0.57%	AU 5 YEAR	0.40
DOW JONES	31,176.01	-0.04%	AUD/EUR	0.6379	-0.24%	PLATINUM (OZ)	\$1,125.31	1.42%	AU 10 YEAR	1.11
S&P 500	3,853.07	0.03%	AUD/GBP	0.5653	-32.44%	BRENT CRUDE (BBL)	\$56.07	-0.02%	AU 15 YEAR	1.43
FTSE 100	6,715.42	-0.37%	AUD/JPY	80.3490	0.14%	WTI CRUDE (BBL)	\$53.03	-0.19%	US 2 YEAR	0.12
NIKKEI 225	28,756.86	0.82%	EUR/USD	1.2168	0.48%	NATURAL GAS (MMBtu)	\$2.50	-1.54%	US 5 YEAR	0.45
HANG SENG	29,927.76	-0.12%	GBP/USD	1.3730	0.56%	COPPER (LB)	\$3.65	0.15%	US 10 YEAR	1.11
VIX	21.32	-1.20%	USD/JPY	103.4900	-0.08%	IRON ORE (MT)	\$171.51	0.60%	US 30 YEAR	1.87

as at approx. 10:30 am

WEEKLY ECONOMIC CALENDAR

FRI	22 ND JAN	MON	25 TH JAN	TUES	26 TH JAN	WED	27 TH JAN	THURS	28 TH JAN
	Markit Manufacturing PMI Flash (JAN), Markit Services PMI Flash (JAN), Retail Sales MoM Prel (DEC)		(GER) Ifo Business Climate (JAN)		Employment Change (OCT), Unemployment Rate (NOV)		Inflation Rate YoY (Q4), Westpac Leading Index MoM (DEC), NAB Business Confidence (DEC)		Consumer Confidence Final (JAN), (GER) Inflation Rate YoY Prel (JAN)
	Markit Manufacturing PMI Flash (JAN), Existing Home Sales MoM (DEC)		Chicago Fed National Activity Index (DEC)		House Price Index MoM (NOV), CB Consumer Confidence (JAN)		MBA Mortgage Applications (22/JAN), Durable Goods Orders MoM (DEC), Fed Interest Rate Decision		GDP Growth Rate QoQ Adv (Q4), Initial Jobless Claims (23/JAN), CB Leading Index MoM (DEC), New Home Sales MoM (DEC)

TODAY'S CORPORATE ACTIONS

ANLOA

NEW LISTING: [ANLOA] AMANI GOLD OPT JAN24

CLZ

QUOTED: Ex Bonus Issue

CLZOA

NEW LISTING: [CLZOA] CLASSICMIN OPTFEB24D

MIR

QUOTED: Ex Dividend

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