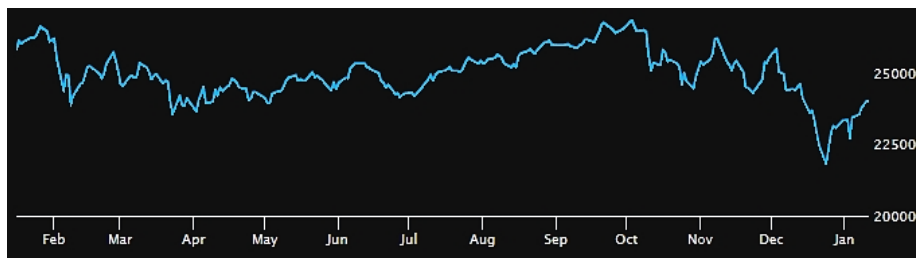


HEADLINES

US MARKETS

US stocks closed mostly lower Monday after data showing weakness on the global economic front triggered heavy losses at the end of last week while investors continued to fret over the inversion of the yield curve. However, the Dow bucked the trend to rise as shares of Boeing Co. rallied after recent losses. The S&P 500 index shed 2.35 points to 2,798.36 with technology and financials topping the losses. The Nasdaq Composite index edged down 5.13 points to 7,637.54. The DJIA rose 14.51 points to 25,516.83. The S&P 500 financial index ended down 0.4%, falling for a fifth straight day, its longest losing streak this year.

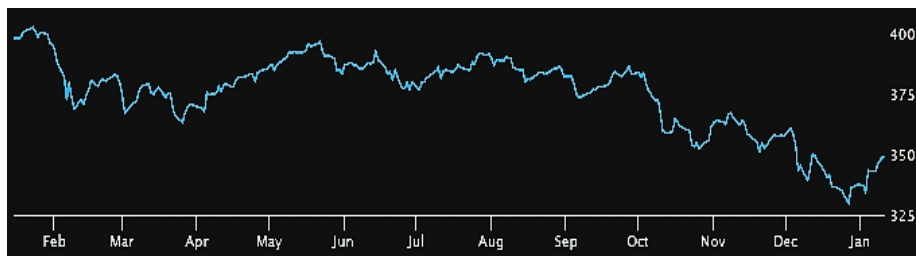
DOW JONES ONE-YEAR CHART



EUROPEAN MARKETS

European markets dipped but found resistance as positive German business climate figures countered Friday's economic -data driven selloff. The STOXX600 was down 0.3% to 375.04. Italy's FTSE MIB rose 0.5% to 21,186.04, Germany's DAX opened slightly, but last traded flat at 11,364.75. The FTSE 100 slipped 0.1% to 7,197.99. The German IFO business climate survey surprised to the upside at 99.6 for march, higher than analysts' expectations of 98.3 and the previous figure of 98.5. This was welcome news to investors spooked by Friday's Purchasing Managers Index (PMI) data indicating that the German economy was slowing.

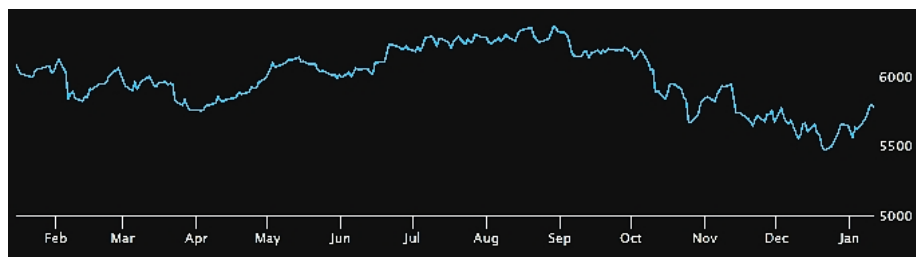
STOXX 600 ONE-YEAR CHART



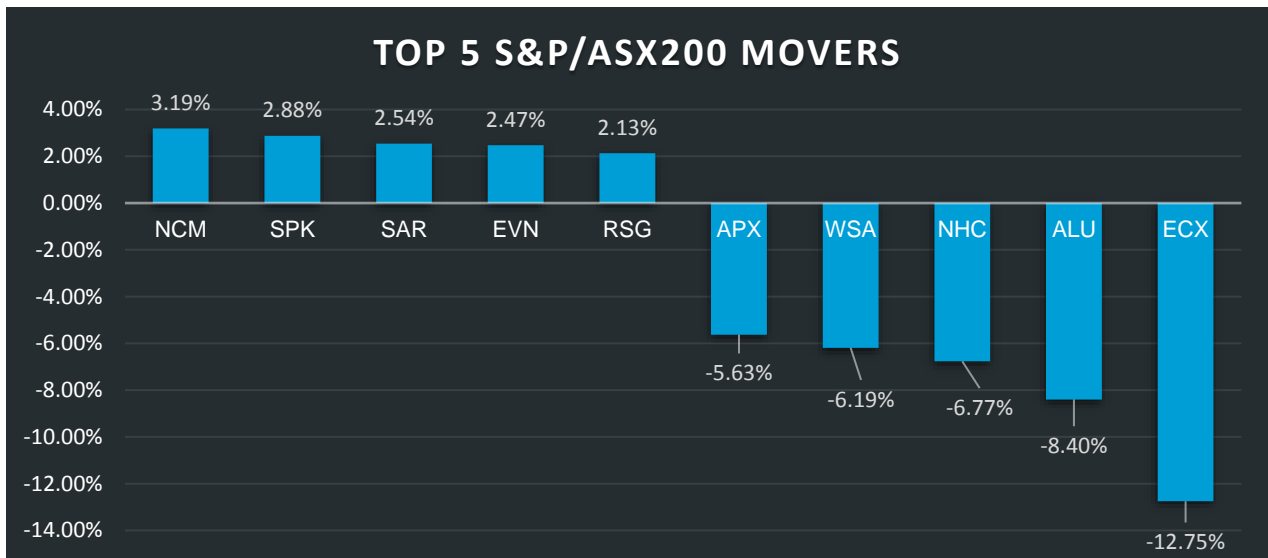
AUSTRALIAN MARKET

Australian shares fell to their second-worst session this year, as global concerns over economic growth and the potential of a US recession weighed on local investor sentiment. The S&P/ASX 200 index fell 1.1% to 6126.2 while the all ordinaries slid 1.2% to 6208.7. Fears of a recession sent the yield on the US 10 yr treasury bond below the 3 month yield, causing shares to plummet around the world. BHP Group closed the session 1.3% lower to \$37.13, Rio Tinto slid 11% to \$93.13, South32 went down 2.8% to \$3.76 and fortescue Metals Group slipped 1.2% to \$6.51. The market slide was capped slightly by gains in gold mining, real estate investment trust and infrastructure stocks. Gold producer Newcrest Mining rose 3.2% to \$26.20, Spark New Zealand advanced 2.9% to \$3.57, Saracen Mineral climbed 2.5% to \$2.83 and Resolute Mining closed at \$1 up 2.1%

ASX 200 ONE-YEAR CHART



TOP MOVERS (PREVIOUS SESSION)



MARKET DATA

INDICES	CLOSE	CHANGE	FX	CLOSE	CHANGE	COMMODITIES	PRICE (US\$)	CHANGE	AU BONDS	RATES
ASX 200	6126	-1.11%	AUD/USD	0.7108	0.34%	GOLD	\$1,321.80	0.66%	1 YEAR	1.46%
SPI FUTURES	6120	0.20%	AUD/NZD	1.029	-0.09%	SILVER	\$15.55	0.68%	2 YEAR	1.46%
DOW	25517	0.06%	AUD/EUR	0.6280	0.19%	PLATINUM	\$852.00	0.95%	3 YEAR	1.46%
FTSE 100	7178	-0.42%	AUD/GBP	0.5388	0.58%	BRENT CRUDE	\$59.18	0.07%	4 YEAR	1.45%
NIKKEI 225	20977	-3.01%	AUD/YEN	78.14	0.33%	NATURAL GAS	\$2.75	0.18%	5 YEAR	1.45%
HANG SENG	28523	-2.03%	EUR/USD	1.131	0.11%	COPPER	\$2.85	0.38%	10 YEAR	1.78%
VIX	16	-0.91%	GBP/USD	0.0023 (-0.1741%)	0.00%	IRON ORE	\$85.89	0.28%	15 YEAR	2.04%

WEEKLY ECONOMIC CALENDAR

Tue	26-Mar	Wed	27-Mar	Thu	28-Mar	Fri	29-Mar	Sat	30-Mar
	USD Housing Starts (MoM) (FEB)		USD Consumer Confidence Index (MAR)		USD Gross Domestic Product Annualized (QoQ) (4Q T)		EUR German Consumer Price Index (YoY) (MAR P)		USD New Home Sales (MoM) (FEB)
	EUR French Gross Domestic Product (YoY) (4Q F)		NZD RBNZ Official Cash Rate (MAR 27)		USD Initial Jobless Claims (MAR 23)		EUR German Unemployment Change (000's) (MAR)		USD Chicago Purchasing Manager (MAR)

In the US, data on Housing starts (MoM) for February and Building Permits will be released. In the Eurozone, the latest data on the French GPD YoY will be released.

TODAY'S CORPORATE ACTIONS

ASX code:	Action:
EPW	QUOTED: Ex Dividend
PEA	QUOTED: Ex Dividend
SSG	QUOTED: Ex Dividend
ACWN	NEW LISTING: [ACWN] ACTINOGEN DEF X OPT
AVQNB	NEW LISTING: [AVQNB] AXIOM MINE CDI DEF
MOHO	NEW LISTING: [MOHO] MOHO RES OPTJUL23D
ANVHP	NEW LISTING: [ANVHP] 2034
ANVHQ	NEW LISTING: [ANVHQ] 29
ANVHR	NEW LISTING: [ANVHR] 29

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