

# **Market Opener**

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Perth, Sydney ABN 95 092 989 083 | AFSL 247 100 Participant of ASX, Chi-X Australia, SSX & NSX

Markets				
SFE 200 Futures (9.30am AEDT)	6701	-25	-0.4	
NZX 50	10848	16	0.2	
DJIA Futures	30327	-26	-0.1	
S&P 500 Futures	3665	-11	-0.3	
NASDAQ Futures	11022	-68	-0.6	

#### Local Markets Commentary

The Australian market commences Friday trade with the \$A trading at ~US62.80c, material regional data in hand and more to come, and UK parliamentarians needing to install a new PM.

US equities markets again settled lower overnight.

**Locally** today, no major economic reports are scheduled for release. AGM and quarterly updates continue, however.

**Regionally**, **Japan** is scheduled to report September **CPI** at **10.30am** AEDT.

Pre-trade, **South Korea** has reported September **producer prices**, these rising 0.2% for the month after declining by 0.4% during August.

Against September 2021, prices were up 8.0%.

Also this morning, **New Zealand** has reported September **trade** figures, these including a \$NZ1.615B deficit against forecasts for a \$NZ1.820B shortfall following August's \$NZ2.652B deficit.

NB: China's September quarter **GDP** growth, and September updates for **industrial production**, **fixed asset investment** and **retail sales**, scheduled for release Tuesday, have been tentatively rescheduled for early next week, together with September **trade** statistics, which had been listed for publication Friday last week.

In overnight commodities trade, Brent **crude** settled virtually flat for the second time this week. WTI crude **oil** turned to post a moderate gain.

US gold futures swung to a slight gain.

**Iron ore** (Nymex CFR China, 62% Fe) continued lower, but by just US10c/t.

LME (3mth evening) **copper** and **aluminium** were reportedly trading  $\sim 2\%$  higher at 1600 GMT. Nickel was reported up a further  $\sim 0.8\%$ .

Last night's LME final price updates were unavailable from IRESS at time of publication. These are expected to become available via IRESS at 10.30am AEDT.

The **\$A** was ultimately pushed to ~US62.80c after trading at ~US62.60c – US62.85c early yesterday evening.

Markets in **New Zealand** and **Singapore** will be **closed Monday**, due to public holidays.

# **Overseas Markets**

INDEX	CLOSE	+/-	%
Dow Jones	30334	-90	-0.3
S&P 500	3666	-29	-0.8

Friday, 21 October 2022

Please see disclaimer at end of this document

# **Today's Stock Watch**

### **Cash Converters (CCV)**

Planning to secure 100% of the Cash Converters New Zealand Master Franchisor for up to \$15.5M. CCV holds 25%.

# Worley Ltd (WOR)

Today's AGM materials lodged pre-trade.

#### Sezzle Inc (SZL)

Reporting \$US421.5M September quarter underlying merchant sales and \$US30M total income, representing respective 0.6% and 4.0% quarterly gains.

#### Aussie Broadband (ABB)

Today's AGM materials lodged pre-trade.

#### Adairs Ltd (ADH)

Today's AGM materials lodged pre-trade.

# McGrath Ltd (MEA)

Market conditions remain challenging.

Anticipating 50% lower underlying EBITDA for 1H FY23 than for 1H FY22.

Expecting to record a profit however, supported by franchise business growth.

Holding \$30M cash. Nil debt.

Promising growth strategy and trading updates at the 22 November AGM.

#### Wisetech Global (WTC)

Non-executive directors Mike Gregg and Ariene Tansey plan to retire from the WTC board at the end of the 23 November AGM.

#### Resources

### Podium Minerals (POD)

WA Parks Reef updated resource estimate anticipated by month's end.

Meanwhile, POD has lodged significant 5E PGM assays from latest drilling.

#### Jervois Mining (JRV)

September quarter update and forum presentation lodged this morning.

#### Energy

#### Yancoal Australia (YAL)

Produced 13.2Mt of ROM coal during the September quarter and 7.3Mt of attributable saleable coal.

Attributable coal sales tallied 6.7Mt. \$A481/t average realised price. \$3.4B cash.

#### Deep Yellow (DYL)

Reporting 'positive' results from Namibia Omahola uranium project follow-up RC and core drilling.

NASDAQ	10615	-66	-0.6
FTSE 100	6944	19	0.3
DAX 30	12767	26	0.2
Shanghai Comp	3035	-9	-0.3

#### **Overseas Markets Commentary**

Major European and UK equities markets opened lower overnight, but recorded ultimate gains after being dragged higher by early positive US equities trade sentiment.

US risk appetite waned in late first-half US trade, however, pushing key US equities indices lower for the session.

Trade considerations included central bank policy, mixed data releases, economic slowdown warnings from high-profile corporates, and the UK's political environment.

Earlier yesterday afternoon (AEDT), the People's Bank of China retained one-year and five-year loan prime rates at 3.65% and 4.3% respectively.

Overnight, among a bevy of US Federal Reserve officials speaking publicly, the Philadelphia district president offered the central bank would need to slow the US economy further in order to curb inflation, suggesting it was early days for interest rate increases.

In the UK, the PM heeded a growing chorus of calls to resign, sparking further demands for a general election.

In geopolitical developments, European Union (EU) leaders again met to debate energy supply and security proposals.

Among overnight data releases, Germany's September producer prices were reported 2.3% higher for the month, following a 7.9% August hike and forecasts for a new 5.1% appreciation.

Against September 2021, prices were up 45.8%.

In the US, the October Philadelphia Fed manufacturing index improved to -8.7 from -9.9, but a stronger advance to -6.0 had been anticipated.

The business conditions component index plunged to -14.9 from -3.9.

Weekly initial jobless claims tallied 214,000 following forecasts for 230,000 after 226,000 the previous week.

September existing home sales fell 1.5% for the month against forecasts for a 0.8% decline.

The Conference Board's September leading index came in at -0.4% from 0.0% for August. Economists had anticipated -0.2%.

Tonight in the US, the September budget statement is listed for release.

Elsewhere, the UK provides a retail sales update as GfK releases a UK consumer sentiment reading.

European Central Bank (ECB) president Christine Lagarde is scheduled to speak publicly over the weekend.

Companies listed to report earnings include: American Express, EssilorLuxottica, Reliance Industries, Renault, Schlumberger, Tokyo Steel Manufacturing Co and Verizon Communications.

	Commodities			
COMMODITY	CLOSE	\$US/	+/-	%
Gold (COMEX 100 Dec)	1636.8	OZ	2.60	0.2

# **Pre-Open Announcements**

# Genworth Mortgage Australia (\* GMA)

GMA has appointed Leona Murphy as an independent, nonexecutive director, effective 1 November.

# Coventry Group (CYG)

Today's AGM materials lodged pre-trade.

# Blackmores Ltd (BKL)

14.77% proxy and 43.35% poll votes recorded against adoption of the company's remuneration report at yesterday's AGM.

BKL traded at \$63.63 - \$66.48 (opening price) yesterday before settling at \$64.73, 2.92% lower for the session.

#### Elixinol Wellness (EXL)

\$2.0M September quarter revenue, following \$1.7M for the June quarter.

#### PointsBet Holdings (PBH)

PBH recorded an ~16.8% vote against the company's remuneration report at yesterday's AGM.

#### APA Group (APA)

APA's Basslink acquisition has been completed.

#### **Resources**

#### Raiden Resources (RDN)

Heralding Mt Sholl drilling which has delivered visual massive, semi-massive and disseminated nickel and copper sulphides. Details and commentary lodged this morning.

# Strickland Metals (STK)

Spin-out plans lodged pre-trade.

# Alkane Resources (\* ALK)

ALK has awarded \$1000 worth of ALK shares to each eligible employee at no cost to the employees.

The number of new shares issued tallied 307,714.

The issue price was 64c, being the 19 October ASX ALK closing price.

#### Energy

#### Cooper Energy (COE)

Presentation lodged this morning.

#### **Trading Halts**

Company	Code	Resuming
Anatara Lifesciences	ANR	21 Oct
Bowen Coking Coal	BCB	21 Oct
Medibank Private	MPL	21 Oct
Odin Metals	ODM	21 Oct
Roots Sustainable Agricultural	ROO	21 Oct
Toys'R'Us ANZ	TOY	21 Oct
Delorean Corporation	DEL	24 Oct

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#### **Commodities Commentary**

*Oil* – \$US2/bbl early gains were largely forfeited as prices were again pushed and pulled overnight by supply and demand scenarios amid recession and inflation debate, and currency moves.

Reports emerged in the meantime that China was considering reducing the Covid quarantine time required of incoming travellers.

The WTI November contract expired at the end of the overnight session. December futures slipped US1c/bbl for the session, to \$US84.51/bbl.

Tonight in the US, a weekly petroleum drill rig report is due.

Gold - the \$US swung overnight, pushed higher by US Federal Reserve comments but pulled lower by some weaker-thananticipated US economic data.

This influenced gold sentiment, with Comex futures ultimately scoring a slight gain.

Base metals – a softer \$US and a positive move in relation to China's Covid containment measures were viewed as major factors supporting overnight base metals trade.

LME-registered warehouse aluminium stocks were reported 18% lower in a day, despite September global supply estimated 4.3% higher than for September 2021.

Meanwhile, both Freeport-McMoRan and Trafigura warned of tight international copper supply.

NB: China's September quarter GDP growth, and September updates for industrial production, fixed asset investment and retail sales, were scheduled for release Tuesday. However, these, together with September trade statistics, listed for publication Friday last week, have been tentatively rescheduled for early next week, following the conclusion of the National Congress.

Material announcements are anticipated from the ongoing National Congress.

LAST	+/-	%
0.6281 0.9783	0.0040 0.0005	0.64 0.05
	0.6281	0.6281 0.0040

Findi Ltd	FND	24 Oct
Galan Lithium	GLN	24 Oct
NeuRizer Ltd	NRZ	24 Oct
Pantoro Ltd	PNR	24 Oct

#### Suspensions (selected)

Company	Code	Since
1 <sup>st</sup> Group	1ST	12 Oct
C29 Metals	C29	20 Oct
Candy Club Holdings	CLB	11 Oct
Duke Exploration	DEX	19 Oct
EBR Systems	EBR	14 Oct
Protean Energy	POW	11 Oct
Seafarms Group	SFG	30 Sep

#### **Ex-Dividends**

Code	Ex-Div	Div (c)	Franking (%)	Yield (%)
GQG	Today	2.04	0	4.17
SNC	Today	2.75	100	3.79
NHC	Mon	56	100	3.48
CLV	Tue	1	100	0.84
MMS	Wed	74	100	2.54
ACF	Thu	1.5	60	4.48
BOQ	Thu	24	100	5.77
GNP	Thu	1.8	100	0.00
GCI	Fri	1.22	0	tbc
ASG	31 Oct	9	100	7.00

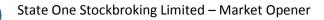
#### **Reports & Events**

(selected; all times AEDT)

When	Company	Report/Event
Today	ADH	AGM
	ABB	AGM
	BSL	ESG investor briefing
	CWY	AGM
	EVT	AGM
	IAG	AGM
	ΚΟν	AGM
	MAH	AGM
	MP1	AGM
	SXG	AGM
	SXL	AGM
	WOR	AGM
Mon	ARG	AGM
	OZL	Sep Q
Tue	AD8	AGM

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# Friday, 21 October 2022

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URW       Sep Q         WHC       AGM         WHC       AGM         AGM       AGM         APM       AGM         BBT       Sep Q         CGF       AGM         DTL       AGM         EB0       AGM         B1H       AGM         JHG       Sep Q         GDR       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         S22       AGM         S232       AGM         S24       AGM         S25       AGM         S24       AGM         AGM						
WHC WOWAGM AGMThuANZ APM AGM BBTFull year AGM AGMBBTSep QCGFAGM CTDAGM AGMDTL EBOAGM AGMFMGSep QGQDAGM AGMJBHAGM AGMJHGSep QGUDAGM AGMJHGSep QGUDAGM AGMJHGSep QGUDAGM AGMJHGSep QGUDAGM AGMJHGSep QGUDAGM AGMJHGSep QGUDAGM AGM AGMJHGSep QAGM SizAGM AGMSULAGM AGM AGMSULAGM AGM AGMFri (28 oct)ARB AGM AGM						
WOW       AGM         Thu       ANZ       Fulyear         APM       AGM         BBT       Sep Q         CGF       AGM         CTD       AGM         DTL       AGM         BBT       Sep Q         CGF       AGM         DTL       AGM         BBO       AGM         BBO       AGM         BBO       AGM         CGF       AGM         BBO       AGM         BBO       AGM         BBO       AGM         BBO       Sep Q         GOR       Sep Q         GUD       AGM         JBH       Sep Q         ICC       Sep Q         MTO       AGM         BR       Sep Q         MTO       AGM         REH       Sep Q         RRL       Sep Q         RWC       AGM         S22       AGM         S23       AGM         SUL       AGM         SUL       AGM         SUL       AGM         SUL       AGM         SUL       AGM						
Thu       ANZ       Ful year         APM       AOM         BBT       Sep Q         CGF       AGM         CTD       AGM         DTL       AGM         BBT       Sep Q         FWD       AGM         BBT       AGM         CTD       AGM         BBT       AGM						
APM       AGM         BBT       Sep Q         CGF       AGM         CTD       AGM         DTL       AGM         FWD       AGM         FWD       AGM         GOR       Sep Q         GUD       AGM         JBH       AGM         JBH       AGM         JHG       Sep Q (7pm; w/cast 11pm)         LYC       Sep Q         MTO       AGM         REH       AGM         REH       AGM         Stal       Sep Q         RUC       AGM         Stal       Sult         AGM       Stal         REH       AGM         Stal       AGM         Stal       AGM         Stal       AGM         Stal       AGM         Stal       AGM         Stal       AGM         AGM       Stal         AGM       Stal         AGM       Stal         AGM       Stal         AGM       AGM         CAR       AGM					wow	AGM
BBT       Sep Q         CGF       AGM         CTD       AGM         DTL       AGM         EBO       AGM         FWD       AGM         GOR       Sep Q         GOR       Sep Q         GUD       AGM         JBH       AGM         JHG       Sep Q         JHG       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         Sep Q       AGM         JHG       Sep Q         MTO       AGM         REH       AGM         Sep Q       AGM				Thu		
CGF       AGM         CTD       AGM         DTL       AGM         EBO       AGM         FWD       AGM         GOR       Sep Q         GUD       AGM         JBH       AGM         JHG       Sep Q         UYC       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         RRL       Sep Q         SUL       AGM         SUL       AGM         SUL       AGM         KRL       Sep Q         SUL       AGM         SUL       AGM         KRE       AGM         SUL       AGM         KES       AGM         KES       AGM					APM	AGM
CTD       AGM         DTL       AGM         EBO       AGM         FWD       AGM         GOR       Sep Q         GOR       Sep Q         JBH       AGM         LYC       Sep Q         JHG       Sep Q         JHG       Sep Q         JHG       Sep Q         JHG       Sep Q         REH       AGM         REH       AGM         Sep Q       AGM         Sul       AGM         Sul<					BBT	
DTL       AGM         EB0       AGM         FWD       AGM         FMG       Sep Q         GOR       Sep Q         GUD       AGM         JBH       AGM         JHG       Sep Q (7pm; w/cast 11pm)         LYC       Sep Q (7pm; w/cast 11pm)         LYC       Sep Q (7pm; w/cast 11pm)         NTO       AGM         REH       AGM         RRL       Sep Q         Sep Q       AGM         Sep Q       AGM         RUC       AGM         Sill       AGM         Sill       AGM         VWES       AGM         VWES       AGM         AGM       AGM         AGM       AGM					CGF	
EBO       AGM         FWD       AGM         FWD       Sep Q         GOR       Sep Q         GUD       AGM         JBH       AGM         JHG       Sep Q (7pm; w/cast 11pm)         LYC       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         RRL       Sep Q         RWC       AGM         S32       AGM         SUL       AGM         SUL       AGM         WES       AGM         WES       AGM         WES       AGM					CTD	AGM
FWD       AGM         FMG       Sep Q         GOR       Sep Q         GUD       AGM         JBH       AGM         LYC       Sep Q         MTO       AGM         REH       AGM         Sep Q       AGM         Sep Q       AGM         LYC       Sep Q         BH       AGM         AGM       AGM         Sep Q       AGM         REH       AGM         Sep Q       AGM         Sul       AGM         Sul       AGM         Sul       AGM         Sul       AGM         Fri (28 Oct)       ARB       AGM         CAR       AGM					DTL	AGM
FMG       Sep Q         GOR       Sep Q         GUD       AGM         JBH       AGM         JHG       Sep Q (7pm; w/cast 11pm)         LYC       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         Sep Q       Sep Q         RRL       Sep Q         Sult       AGM         Sult       AGM         WES       AGM         VES       AGM						
GORSep QGUDAGMJBHAGMJHGSep Q (7pm; w/cast 11pm)LYCSep QMTOAGMPNIAGMREHAGMRRLSep QRWCAGMS32AGMSULAGMVESAGMVESAGMVESAGM					FWD	AGM
GUD AGM JBH AGM JHG Sep Q (7pm; w/cast 11pm) LYC Sep Q MTO AGM PNI AGM AGM AGM REH AGM REH AGM Sep Q RWC AGM S22 AGM S32 AGM SUL AGM SUL AGM SUL AGM SUL AGM SUL AGM SUL AGM SUL AGM SUL AGM CAR AGM						Sep Q
JBH       AGM         JHG       Sep Q(7pm; w/cast 11pm)         LYC       Sep Q         MTO       AGM         PNI       AGM         REH       AGM         RRL       Sep Q         State       AGM         RRL       AGM         State       AGM         RWC       AGM         State       AGM         State       AGM         State       AGM         Fri (28 Oct)       ARB       AGM         CAR       AGM					GOR	Sep Q
JHGSep Q (7pm; w/cast 11pm)LYCSep QMTOAGMPNIAGMREHAGMSep QRRLSep QAGMSulAGMSULAGMVESAGMFri (28 Oct)ARB CARAGM					GUD	AGM
LYC Sep Q MTO AGM PNI AGM REH AGM RRL Sep Q RWC AGM S32 AGM SUL AGM WES AGM WES AGM					JBH	AGM
MTO AGM PNI AGM REH AGM RRL Sep Q RWC AGM S32 AGM SUL AGM WES AGM					JHG	Sep Q (7pm; w/cast 11pm)
PNI AGM REH AGM RRL Sep Q RWC AGM S32 AGM SUL AGM WES AGM HAT AGM					LYC	Sep Q
REH AGM RRL Sep Q RWC AGM S32 AGM SUL AGM WES AGM HIT IN					MTO	AGM
RRL Sep Q RWC AGM S32 AGM SUL AGM WES AGM					PNI	AGM
RWC AGM S32 AGM SUL AGM WES AGM 					REH	AGM
S32 AGM SUL AGM WES AGM 					RRL	Sep Q
SUL       AGM         WES       AGM         Fri (28 Oct)       ARB       AGM         CAR       AGM					RWC	AGM
WES     AGM       Fri (28 Oct)     ARB     AGM       CAR     AGM					S32	AGM
Fri (28 Oct) ARB AGM CAR AGM					SUL	AGM
CAR AGM					WES	AGM
CAR AGM				<b>Fri</b> (28 Oct)	ARB	AGM
				( )		

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