

21 October 2021

## Latest news

- The **Australian sharemarket** finished flat on Thursday, with the ASX 200 hitting its intraday high early before fading all afternoon. The index rose by just 1.7pts or 0.02 per cent to 7415.4. This coincided with losses across most major Asian markets and futures suggesting a soft start in the United States is likely.
- There was an **even split between winners and losers** on the local Bourse, with six sectors losing ground and five heading higher. Perpetual (PPT), CIMIC (CIM), and Healius (HLS) were the three strongest performers while Flight Centre (FLT), Super Retail Group (SUL) and The a2 Milk Company (A2M) fell most.
- **Perpetual (PPT)** rose by 7.8 per cent after reporting an increase in assets under management. **CIMIC (CIM)** rose by 5.85 per cent after the construction group maintained profit guidance of between \$400-\$430m this year. It was awarded \$16m in new work over the past nine months and has \$35bn of work-in-hand. **Healius (HLS)** jumped 4.4 per cent after delivering a trading update. The imaging and pathology company handed down a 44 per cent lift in revenues between July and September. It attributed this partly to the 40,000 daily Covid tests it carried out across its 100 labs.
- **Aristocrat Leisure (ALL)** rose by 3.3 per cent and hit a record high after resuming trade. It announced the acquisition of UK based online gambling software group Playtech on Monday for ~\$4bn, which it hopes will accelerate its growth strategy over the medium term. ALL was in a trading halt from Monday - Wednesday to raise funds from institutional investors.
- **Endeavour Group (EDV)** held its AGM on Thursday. The drinks business which operates BWS, Dan Murphy's and Jimmy Brings has experienced strong demand for alcohol during the pandemic, however said it is 'extremely difficult' to forecast the next 12 months due to COVID-19 uncertainty. Over 40 per cent of its more than 300 hotels were closed over the quarter due to NSW and Victorian lockdowns.
- **Transurban (TCL)** also flagged the significant adverse impact from the stay-at-home orders. Traffic slumped by more than 40 per cent on its toll roads in Sydney and Melbourne between July and September.
- Production at both **Woodside (WPL)** and **Santos (STO)** declined over the past quarter. However, thanks to surging energy prices, revenues have still improved. Their shares fell on Thursday.
- **5.5bn shares were traded on Thursday, worth a well above average \$10.1bn (options and futures expiry today).** 676 stocks rose, 757 fell and 425 finished unchanged.
- **Tonight**, American Airlines, AT&T, Dow, Mattel, Snap and Intel are just some of the companies set to post US earnings. Data on home sales and weekly jobless claims (measures the number of Americans filing for unemployment benefits for the first time) are also due.

Latest Prices	4.30pm AEDT		% chg
	Level	Previous	
All Ords	7,728.5	7,727.2	0.0
ASX 200	7,415.4	7,413.7	0.0
Shanghai	3,586.6	3,587.0	0.0
Japan Nikkei	28,708.6	29,255.6	-1.9

US Dow Jones	35,609.3	35,457.3	0.4
US Nasdaq	15,121.7	15,129.1	0.0
UK FTSE	7,223.1	7,217.5	0.1
Dow Futures	35,401.0	35,477.0	-0.2

	Last	Previous	% chg
Consumer Discretionary	3,503.3	3,514.9	-0.3
Consumer Staples	13,737.6	13,891.0	-1.1
Energy	8,731.6	8,851.8	-1.4
Financials	6,874.3	6,855.2	0.3
Financial-x-A-REIT	7,667.1	7,645.9	0.3
Health Care	44,799.0	45,002.5	-0.5
Industrials	6,501.8	6,522.3	-0.3
Information Tech	2,357.5	2,344.3	0.6
Materials	15,323.6	15,331.2	0.0
ASX200 A-REIT	1,648.7	1,621.6	1.7
Telecommunications	1,526.3	1,525.3	0.1
Utilities	6,204.6	6,194.9	0.2

	Last	Day Move	% chg
BHP	\$38.48	-\$0.09	-0.2
RIO	\$96.79	-\$1.29	-1.3
CBA	\$104.95	-\$0.08	-0.1
ANZ	\$28.24	-\$0.15	-0.5
NAB	\$28.90	\$0.07	0.2
WBC	\$25.83	\$0.15	0.6
TLS	\$3.73	-\$0.02	-0.5
WOW	\$39.64	-\$0.35	-0.9
WES	\$55.55	-\$0.68	-1.2
WPL	\$23.95	-\$0.57	-2.3
CSL	\$294.65	-\$3.02	-1.0
COH	\$219.96	-\$0.26	-0.1
NCM	\$24.92	\$0.10	0.4

	Current	Aust 4pm	% chg
AUD/USD	0.7490	0.7516	-0.35
AUD/EUR	0.6428	0.6452	-0.37
AUD/JPY	85.362	85.868	-0.59

11am Official Cash	0.10	0.10	0.00
Aust 90 day futures	0.00	0.00	0.00
Oil Nymex (\$US/b) US Close	83.06	83.42	0.0
Gold futures(\$US/oz) US Close	1786.30	1784.90	-0.1

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