



HD HOT SPOTS OF THE DAY

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TD

S&P/ASX 200 closed at 5435.3 down 73.7

SPI Futures latest at 5374 down 75

Aussie 10 year **bonds** were at 3.32%, 19 points lower yield.

The \$A is at 0.9253us

TOP TWENTY

AMP -9c to \$5.23 on 9.3m shares.

ANZ -59c to \$32.26 on 6.2m shares.

BHP -73c to \$37.74 on 7.7m shares.

BXB -8c to \$9.04 on 3.13m shares

CBA -\$1.22 to \$80.13 on 3.6m shares.

CSL -25c to \$63.94 on 1.2m shares

FMG -16c to \$4.56 on 21.49m shares

MQG -87c to \$55.65 on 1.4m shares.

NAB -63c to \$33.82 on 5.7m shares.

ORG -7c to \$13.74 on 3.88m shares

QBE -8c to \$10.74 on 5.9m shares.

RIO +11c to \$66.43 on 4.2m shares.

STO -8c to \$14 on 3.14m shares

SUN -10c to \$13.87 on 3.59m shares.

TLS -4c to \$5.39 on 27.7m shares.

WBC -62c to 433.03 on 5.59m shares.

WES -57c to \$42.44 on 1.79m shares.

WFD -3c to \$7.25 on 8.76m shares.

WOW -56c to \$35.67 on 2.4m shares.

WPL -36c to \$41.60 on 1.7m shares

BOJ current a/c falls to a deficit first time in five months

The Bank of Japan kept monetary policy steady on Friday and offered a bleaker view on exports and output after recent weak data cast doubts over its optimistic view that the economy is steadily recovering. Japan's current account swung to a deficit in June for the first time in five months, government data showed on Friday, due to a decline in earnings on overseas investments.

While **China's** trade balance rose to a record surplus and **iron ore** imports were strong, Australia's number two trading partner Japan's report today was not so bullish - and the US authorising air strikes in Iraq adding to Gaza and Ukraine bloodshed cast gloom over the market.

Our market fell sharply with the biggest contributor to the downside being the banks, as proxy for the \$A on heavy volume worth \$4.8 **billion** as overseas money fled on "risk off" trading. The \$A is at 92.50US c, down 15 points from last evening while bond yields fell 19 points to 3.32% as investors rushed to preserve capital, never mind the yield!

***Gold** stocks were the big winners, as the yellow metal rose on escalating global troubles.

Over the week the index lost 121.1 points or 2.2% to 5435.3.

The winner for the week was RIO, up 103c or 1.6% to \$66.43 followed by Santos, steady at \$14. Woodside was the best of the weakeners, shedding 32c or 0.8% to \$41.6.

On the downside ANZ fell furthest, shedding 130c or 3.9% to \$32.26 followed by Macquarie, down 206c or 3.6% to \$55.65 and Origin, down 49c or 3.4% to \$13.74.

*At 4pm AEST the Nikkei Dow futures was down 380 points to 14,810 points, Shanghai CSI physical was up 6.52 points to 2194.19, Hang Seng futures was up 22 pointst o 24,392 points, S&P futures was down 10.5 points to 1894.70, Nasdaq futures was down 22.25 points to 3834.50, Dow futures was down 78 points to 16,243 points.

Spot **gold** was up \$7 to \$1318. Crude was up 70c to \$98.04.

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