

Australian Market Update

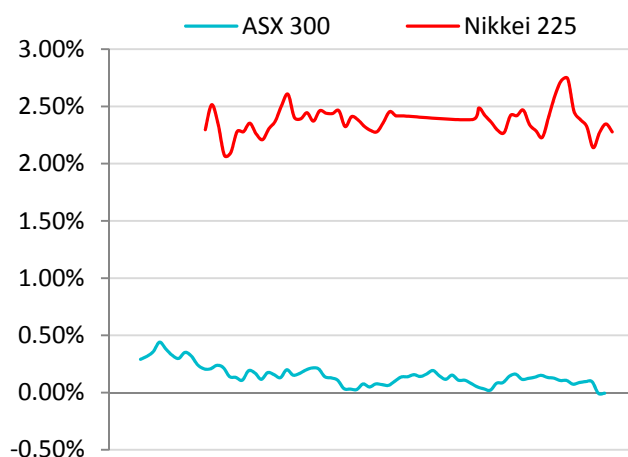
Asian stocks mixed as Nikkei surges on weaker yen

Asian markets were buoyed by Japan today after the yen slumped 1.3% overnight on the back of Haruhiko Kuroda, a potential candidate to head the Bank of Japan, saying additional monetary easing can be justified this year. The Nikkei-225 halted a two-day drop and is now trading within 1% of a four-year high as the yen trades 19% below its level in November 2012 versus the greenback. Korea's KOSPI, meanwhile, reversed a gain of as much as 0.4% after an earthquake detected in North Korea was said to be likely linked to a nuclear test, according to a South Korean Defence Ministry spokesman. The US Geological Survey measured seismic activity with a magnitude of 4.9. The local market traded broadly flat today on a soft lead from Wall Street. Gold miners were a drag on the ASX 200 as gold futures fell for a fourth day. Newcrest Mining (ASX: NCM) lost 2.2%, Evolution Mining (ASX: EVN) fell 4.5% and Alacer Gold (ASX: AQG) slumped 7.4%.

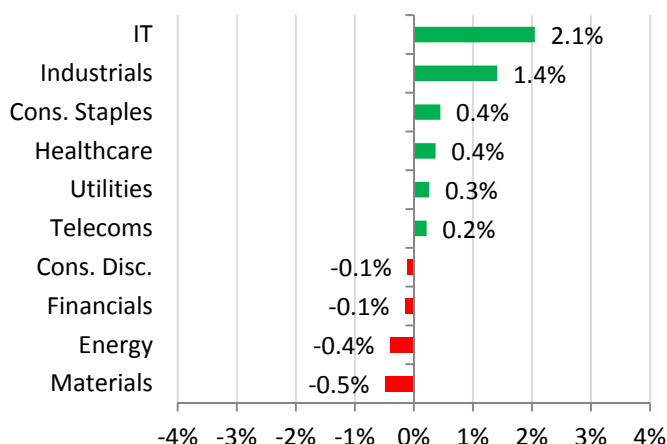
Asia-Pacific Market Data

	Last	+/-	%	1W %	1M %
ASX 200	4,959.0	-0.50	0.0%	1.6%	5.3%
Nikkei 225 (Japan)	11,417.1	254.08	2.3%	1.3%	5.6%
Hang Seng (Hong Kong)	-	-	-	-2.1%	-0.2%
Shanghai Composite	-	-	-	0.6%	8.4%
KOSPI (Sth. Korea)	1,945.8	-4.53	-0.2%	-0.4%	-2.5%
90 Day Bank Bill Rate	3.0	1.00	0.3%	-0.7%	-3.0%
Cash Rate-90 Bill Spread	5.0	-1.00	-	1%	6.4%
Aus 10Yr Bond Yield	3.5	1.00	0.3%	-1.1%	-0.4%
Aus-U.S. 10Yr Spread	149.8	1.63	-	0%	-6.4%
AUD-USD	\$1.0255	-0.0001	0.0%	-1.3%	-3.0%
AUD-Euro	€0.7664	0.0012	0.2%	-0.2%	3.0%
AUD-JPY	¥96.34	-0.2820	-0.3%	0.9%	-2.0%
AUD-GBP	£0.6552	0.0003	0.1%	1.3%	0.3%
AUD-NZD	\$1.2263	-0.0008	-0.1%	0.3%	2.2%

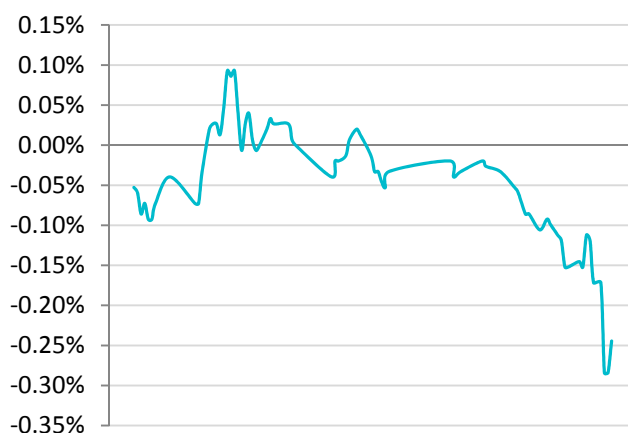
ASX, Japan & HK – Intraday % Chg



Sector Performance – ASX 200



S&P 500 Futures – Intraday % Chg



Data for the tables and charts sourced from Bloomberg & Seismic Research

Resource Stocks – Today's Top Movers

Today's Biggest Winners – ASX 300 Resources

Name	Code	Price A\$	1D +/-	1D %	Industry Group	Industry Subgroup
Alkane Resources	ALK	0.760	0.100	15.2%	Non-Ferrous Mining	Rare Metals & Gold
Bradken	BKN	6.770	0.670	11.0%	Industrial Products & Services	Mining & Industrial Products
Neon Energy	NEN	0.250	0.020	8.7%	Energy	Oil & Gas
Boart Longyear	BLY	2.200	0.170	8.4%	Industrial Products & Services	Drilling Services & Products
Whitehaven Coal	WHC	3.190	0.230	7.8%	Energy	Coal
Ausdrill	ASL	3.080	0.210	7.3%	Industrial Products & Services	Mining & Telco Services
Dart Energy	DTE	0.150	0.010	7.1%	Energy	Oil & Gas
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NRW Holdings	NWH	1.955	0.110	6.0%	Engineering & Construction	Mining Services
Emeco Holdings	EHL	0.630	0.035	5.9%	Industrial Products & Services	Mining Equipment Rental
Sedgman	SDM	1.140	0.060	5.6%	Engineering & Construction	Mining Services
Ausenco	AAX	3.730	0.190	5.4%	Engineering & Construction	Mining & Energy Services
Hills Holdings	HIL	1.010	0.050	5.2%	Building Materials	Building Products
Intrepid Mines	IAU	0.210	0.010	5.0%	Gold/Precious Metals	Gold-Silver
AWE	AWE	1.435	0.065	4.7%	Energy	Oil & Gas
GWA Group	GWA	2.570	0.110	4.5%	Building Materials	Building Fixtures & Fittings
Downer EDI	DOW	4.840	0.190	4.1%	Industrial Products & Services	Resources & Infrastructure Serv.
Galaxy Resources	GXY	0.400	0.015	3.9%	Non-Ferrous Mining	Lithium
Monadelphous Group	MND	27.040	0.930	3.6%	Engineering & Construction	Mining, Oil & Gas & Infra. Serv.
Decmil Group	DCG	2.380	0.080	3.5%	Engineering & Construction	Mining, Oil & Gas & Infra. Serv.

Today's Biggest Losers – ASX 300 Resources

Name	Code	Price A\$	1D +/-	1D %	Industry Group	Industry Subgroup
New Standard Energy	NSE	0.185	-0.015	-7.5%	Energy	Oil & Gas
Azimuth Resources	AZH	0.260	-0.020	-7.1%	Gold/Precious Metals	Gold & Uranium
Alacer Gold Corp. (CDI)	AQG	4.270	-0.320	-7.0%	Gold/Precious Metals	Gold
Tanami Gold	TAM	0.270	-0.020	-6.9%	Gold/Precious Metals	Gold
Focus Minerals	FML	0.028	-0.002	-6.7%	Gold/Precious Metals	Gold
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Troy Resources	TRY	3.100	-0.200	-6.1%	Gold/Precious Metals	Gold-Silver
Samson Oil & Gas	SSN	0.032	-0.002	-5.9%	Energy	Oil & Gas
Bandanna Energy	BND	0.265	-0.015	-5.4%	Energy	Coal
Silver Lake Resources	SLR	2.520	-0.140	-5.3%	Gold/Precious Metals	Gold
Saracen Mineral Holdings	SAR	0.410	-0.020	-4.7%	Gold/Precious Metals	Gold
Evolution Mining	EVN	1.500	-0.070	-4.5%	Gold/Precious Metals	Gold
White Energy Co.	WEC	0.215	-0.010	-4.4%	Energy	Coal
OM Holdings	OMH	0.260	-0.012	-4.4%	Non-Ferrous Mining	Manganese
Medusa Mining	MML	4.910	-0.220	-4.3%	Gold/Precious Metals	Gold
Ampella Mining	AMX	0.340	-0.015	-4.2%	Gold/Precious Metals	Gold
Cockatoo Coal	COK	0.115	-0.005	-4.2%	Energy	Coal
Molopo Energy	MPO	0.350	-0.015	-4.1%	Energy	Oil & Gas
Molopo Energy	MPO	0.350	-0.015	-4.1%	Energy	Oil & Gas
Hillgrove Resources	HGO	0.125	-0.005	-3.8%	Non-Ferrous Mining	Copper

Data for the tables and charts sourced from Bloomberg & Seismic Research

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