Seis. Matters
The Seismic Research Daily Bulletin

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Australian Market Update

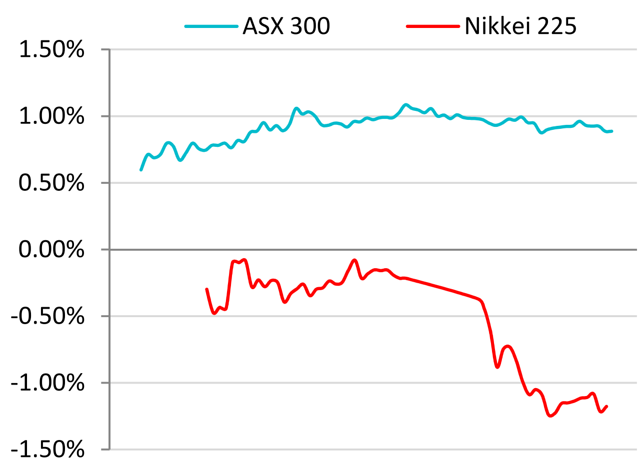
ASX breaks through 5,000 as CBA, LEI beat estimates

The ASX 200 surged 0.9% today, breaking through 5,000 and closing at the highest level since September 2008 as earnings from Commonwealth Bank of Australia (ASX: CBA) and Leighton Holdings (ASX: LEI) beat estimates. To today's high of 5,010, the ASX 200 has rallied 25.7% from a low of 3,985 in June 2012 (just nine months ago). CBA rose 2.4% today to close at a record high of $67.11; leading a 1.4% gain for financials after the bank posted a 1% increase in 2H 2012 profit to $3.66 billion on the back of strong results from its retail banking and wealth management divisions. LEI, Australia's largest construction company, surged 11% (its biggest gain in almost four years) after reporting a return to full-year profitability after completing two major projects and reducing debt levels. Elsewhere in Asia, the Nikkei-225 slumped over 1% after the yen rallied overnight as an unidentified G-7 official said the group is concerned about excessive moves in the currency.

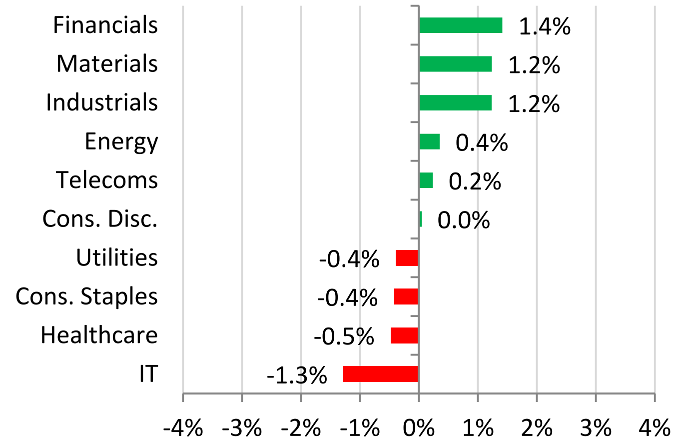
Asia-Pacific Market Data

	Last	+/-	%	1W %	1M %
ASX 200	5,003.7	44.72	0.9%	1.7%	6.2%
Nikkei 225 (Japan)	11,230.7	-133.81	-1.2%	1.7%	4.0%
Hang Seng (Hong Kong)	-	-	-	-2.1%	-0.2%
Shanghai Composite	-	-	-	0.6%	8.4%
KOSPI (Sth. Korea)	1,974.5	26.88	1.4%	1.8%	-1.2%
90 Day Bank Bill Rate	3.0	0.00	0.0%	0.0%	-3.0%
Cash Rate-90 Bill Spread	5.0	0.00	-	0%	6.2%
Aus 10Yr Bond Yield	3.5	5.20	1.5%	-0.5%	1.1%
Aus-U.S. 10Yr Spread	153.5	5.56	-	-2%	-4.2%
AUD-USD	$1.0341	0.0036	0.3%	0.3%	-2.1%
AUD-Euro	€0.7691	0.0040	0.5%	-0.8%	2.6%
AUD-JPY	¥96.28	-0.1390	-0.1%	0.5%	-1.7%
AUD-GBP	£0.6594	0.0020	0.3%	-0.1%	-0.4%
AUD-NZD	$1.2287	0.0026	0.2%	0.0%	2.0%

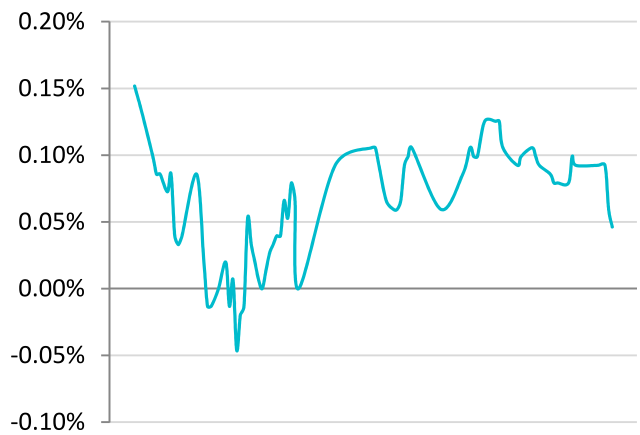
ASX, Japan & HK – Intraday % Chg



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
Tanami Gold	TAM	0.260	0.029	12.5%	Gold/Precious Metals	Gold
Leighton Holdings	LEI	23.140	2.330	11.2%	Engineering & Construction	Construct., Develop. & Mining Serv.
Cape Lambert Resources	CFE	0.230	0.020	9.5%	Iron Ore/Steel	Iron Ore
Bradken	BKN	7.320	0.550	8.1%	Industrial Products & Services	Mining & Industrial Products
Drillsearch Energy	DLS	1.355	0.085	6.7%	Energy	Oil & Gas
Ausenco	AAX	3.950	0.220	5.9%	Engineering & Construction	Mining & Energy Services
Arrium	ARI	1.125	0.060	5.6%	Iron Ore/Steel	Steel & Metal Products
Atlas Iron	AGO	1.740	0.090	5.5%	Iron Ore/Steel	Iron Ore
NRW Holdings	NWH	2.060	0.105	5.4%	Engineering & Construction	Mining Services
Energy World Corp.	EWC	0.310	0.015	5.1%	Utilities	Integrated Utility
Alumina	AWC	1.200	0.055	4.8%	Non-Ferrous Mining	Alumina
Resolute Mining	RSG	1.420	0.065	4.8%	Gold/Precious Metals	Gold
Boart Longyear	BLY	2.290	0.090	4.1%	Industrial Products & Services	Drilling Services & Products
Northern Star Resources	NST	1.045	0.040	4.0%	Gold/Precious Metals	Gold
Greenland Minerals & Energy	GGG	0.400	0.015	3.9%	Non-Ferrous Mining	Rare Earths
Nufarm	NUF	5.650	0.210	3.9%	Basic Materials	Agricultural Chemicals
Azimuth Resources	AZH	0.270	0.010	3.8%	Gold/Precious Metals	Gold & Uranium
Bandanna Energy	BND	0.275	0.010	3.8%	Energy	Coal
Fortescue Metals Group	FMG	5.170	0.180	3.6%	Iron Ore/Steel	Iron Ore
Oz Minerals	OZL	7.470	0.260	3.6%	Non-Ferrous Mining	Copper & Gold

Today's Biggest Losers – ASX 300 Resources

Name	Code	Price A$	1D +/-	1D %	Industry Group	Industry Subgroup
Alkane Resources	ALK	0.680	-0.080	-10.5%	Non-Ferrous Mining	Rare Metals & Gold
Alacer Gold Corp. (CDI)	AQG	4.010	-0.260	-6.1%	Gold/Precious Metals	Gold
New Standard Energy	NSE	0.175	-0.010	-5.4%	Energy	Oil & Gas
Matrix Composites & Eng.	MCE	1.690	-0.090	-5.1%	Industrial Products & Services	Oil & Gas Products & Services
Teranga Gold Corp. (CDI)	TGZ	1.720	-0.080	-4.4%	Gold/Precious Metals	Gold
Noble Mineral Resources	NMG	0.067	-0.003	-4.3%	Gold/Precious Metals	Gold
South Boulder Mines	STB	0.390	-0.015	-3.7%	Non-Ferrous Mining	Potash
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Gindalbie Metals	GBG	0.265	-0.010	-3.6%	Iron Ore/Steel	Iron Ore
Cooper Energy	COE	0.540	-0.020	-3.6%	Energy	Oil & Gas
Metminco	MNC	0.055	-0.002	-3.5%	Non-Ferrous Mining	Copper
Highlands Pacific	HIG	0.145	-0.005	-3.3%	Non-Ferrous Mining	Nickel & Copper-Gold
Mirabela Nickel	MBN	0.470	-0.015	-3.1%	Non-Ferrous Mining	Nickel
Aquila Resources	AQA	2.830	-0.080	-2.7%	Energy	Coal
Maverick Drilling & Expl.	MAD	0.615	-0.015	-2.4%	Energy	Oil & Gas
CSR	CSR	2.120	-0.050	-2.3%	Building Materials	Building Products
Mineral Deposits	MDL	4.300	-0.100	-2.3%	Non-Ferrous Mining	Mineral Sands
Spark Infrastructure Group	SKI	1.640	-0.035	-2.1%	Utilities	Energy Infrastructure Fund
Energy Resources of Aust.	ERA	1.275	-0.025	-1.9%	Energy	Uranium
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