

Statistical tables

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General notes

Owing to the rounding off of figures, the sum of the separate items will sometimes differ from the total shown.

... denotes not available

- denotes a value equal to nil

0 denotes a value between nil and half of the measuring unit

Capital market interest rates and yields

Percentage

Period	Yields ¹ and price indices on bonds traded on the stock exchange ²									Deposit and investment rates			Borrowing rates	
	Government bonds						Other bond index ³	All-bond index ³	Eskom bonds	Weighted average rates			Postbank investment accounts	Predominant rates
	Nominal yields				Real yield	Government bond index ³				Banks				Mortgage loans
	0 to 3 years (2000M)	3 to 5 years (2001M)	5 to 10 years (2002M)	10 years and over (2003M)			10 years and over (2027M)	Fixed deposits			Banks: Dwelling units (2011M)			
					More than 1 year but less than 3 years ¹⁰	3 years and more but less than 5 years ¹¹		More than 5 years						
	(2007M)	(2008M)	(2026M)	(2009M)										
2017	7.88	8.15	8.43	9.47	2.86	586.33	597.05	587.68	11.07	8.47	9.05	8.63	5.90	10.25
2018	7.20	8.31	9.04	9.55	3.26	626.64	658.50	633.15	11.15	8.35	9.02	9.41	5.75	10.25
2019	6.70	7.30	8.37	9.15	3.80	690.79	728.84	698.50	11.04	7.98	8.83	9.47	5.25	10.00
2019: Aug.....	6.73	7.40	8.34	9.04	3.46	675.94	710.36	682.98	10.90	8.11	8.79	9.09	5.25	10.00
Sep.....	6.62	7.29	8.19	8.90	3.53	679.48	714.44	686.61	10.76	8.10	8.89	9.50	5.25	10.00
Oct.....	6.63	7.33	8.25	8.93	3.55	676.75	713.50	684.21	10.75	8.06	8.89	9.49	5.25	10.00
Nov.....	6.67	7.42	8.42	9.14	3.69	677.82	716.09	685.56	10.91	8.02	8.85	9.46	5.25	10.00
Dec.....	6.70	7.30	8.37	9.15	3.80	690.79	728.84	698.50	11.04	7.98	8.83	9.47	5.25	10.00
2020: Jan.....	6.63	7.00	8.16	9.02	3.81	698.81	738.29	706.79	10.95	7.96	8.98	9.59	5.00	9.75
Feb.....	6.56	7.93	8.86	9.28	3.86	698.28	738.22	706.30	10.89	7.80	8.79	9.39	5.00	9.75
Mar.....	6.76	9.29	10.45	10.92	4.64	629.86	669.38	637.62	12.20	7.60	8.78	9.37	4.00	8.75
Apr.....	6.50	9.46	10.72	11.27	4.40	654.71	694.63	662.60	12.68	7.35	8.57	9.25	3.00	7.75
May.....	5.18	7.71	9.33	10.14	4.38	701.15	740.04	709.05	11.78	7.25	8.34	8.96	2.50	7.25
Jun.....	5.08	7.58	9.06	9.97	4.47	692.86	733.73	701.01	11.60	...	...	...	2.50	7.25

KB201

Percentage

Usury Act: Maximum finance charge rates			Prescribed rate of interest ⁵ (Judgement debt)		Rate of interest on loans from the State Revenue Fund ⁶		Official rate of interest ⁷ (Fringe benefit taxation)		Rate of interest on outstanding VAT amounts		
Money loans, and credit and leasing transactions ⁴											
Date	R1 – R10 000	R10 001 – R500 000	Date		Date		Date		Date	Tax ⁸	Refunds ⁹
2009/02/13	25.00	22.00	1986/08/01	15.00	2009/07/01	10.50	2011/03/01	6.50	2009/09/01	10.50	10.50
2009/04/01	23.00	20.00	1987/09/01	12.00	2010/05/01	9.50	2012/08/01	6.00	2010/07/01	9.50	9.50
2009/05/11	22.00	19.00	1989/07/01	18.50	2011/01/01	8.50	2014/02/01	6.50	2011/03/01	8.50	8.50
2009/06/05	21.00	18.00	1993/10/01	15.50	2014/03/01	9.00	2014/08/01	6.75	2014/05/01	9.00	9.00
2009/08/21	20.00	17.00	2014/08/01	9.00	2014/09/01	9.25	2015/08/01	7.00	2014/11/01	9.25	9.25
2010/04/02	19.00	16.00	2016/01/08	9.75	2015/09/01	9.50	2015/12/01	7.25	2015/11/01	9.50	9.50
2010/11/26	18.00	15.00	2016/03/01	10.25	2016/01/01	9.75	2016/02/01	7.75	2016/03/01	9.75	9.75
2012/07/27	17.00	14.00	2016/05/01	10.50	2016/03/01	10.25	2016/04/01	8.00	2016/05/01	10.25	10.25
2014/02/06	18.00	15.00	2017/09/01	10.25	2016/05/01	10.50	2017/08/01	7.75	2016/07/01	10.50	10.50
2015/07/31	19.00	16.00	2018/05/01	10.00	2017/09/01	10.25	2018/04/01	7.50	2017/11/01	10.25	10.25
2016/02/05	20.00	17.00	2019/01/01	10.25	2018/05/01	10.00	2018/12/01	7.75	2018/07/01	10.00	10.00
2018/04/05	19.00	16.00	2019/09/01	10.00	2019/01/01	10.25	2019/08/01	7.50	2019/03/01	10.25	10.25
2018/11/30	20.00	17.00	2020/03/01	9.75	2019/09/01	10.00	2020/02/01	7.25	2019/11/01	10.00	10.00
2019/07/26	19.00	16.00	2020/05/01	8.75	2020/03/01	9.75	2020/04/01	6.25	2020/05/01	9.75	9.75
2020/03/27	18.00	15.00	2020/06/01	7.75	2020/05/01	7.75	2020/05/01	5.25	2020/07/01	7.75	7.75
2020/04/22	16.00	13.00	2020/07/01	7.25	2020/07/01	7.25	2020/06/01	4.75	2020/09/01	7.25	7.25

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- Monthly average bond yield.
- Source: The JSE Limited and the Actuarial Society of South Africa.
- Indices: 1 July 2000 = 100. Month-end values.
- Amount categories from 5 May 1988 as indicated; 5 December 1986 to 4 May 1988: R1 – R4 000 and R4 001 – R70 000; 11 February 1986 to 4 December 1986: R1 – R2 500 and R2 501 – R50 000. From 11 September 1981 to 10 February 1986 money loans were R1 – R2 000, R2 001 – R5 000 and R5 001 – R100 000, and credit and leasing transactions R1 – R10 000 and R10 001 – R100 000. From 31 December 1992 certain exemptions with regard to amounts less than R6 000. From 1 July 1999 certain categories of money-lending transactions of less than R10 000 were exempted. From 16 February 2001 the ceiling amount of R6 000 was increased to R10 000 and the amount categories changed from R1 – R6 000 and R6 001 – R500 000 to R1 – R10 000 and R10 001 to R500 000.
- Prescribed rate of interest (Section 1 of Act No. 55 of 1975), Department of Justice. This Act provides for the calculation and payment of interest on certain judgement debts.
- The standard interest rate applicable to loans granted by the State out of the State Revenue Fund, Exchequer Act No. 66 of 1975. As from 1 April 2000 the Public Finance Management Act No. 1 of 1999, as amended by Act No. 29 of 1999.
- Official rate of interest as defined by the Income Tax Act No. 58 of 1962.
- Interest for failure to pay tax when due. Value-Added Tax Act No. 89 of 1991. As from 1 April 2003 determined in terms of the Public Finance Management Act No. 1 of 1999.
- Interest on delayed refunds. Value-Added Tax Act No. 89 of 1991. As from 1 April 2003 determined in terms of the Public Finance Management Act No. 1 of 1999.
- Before January 2008 this category related to 2-year deposits.
- Before January 2008 this category related to 3-year deposits.

Capital market activity

Primary and secondary markets

R millions

Period	Primary market						Secondary market						
	Net issues of marketable bonds			Share capital raised by companies listed on the JSE ²			Stock exchange transactions						
	Public sector ¹			Private sector			Shares ²			Bonds			
	General government ⁹	Public enterprises ³	Total	Rights issues of ordinary shares	Other share capital raised	Total value of share capital raised	Market capitalisation	Total volume of shares traded ⁴	Total value of shares traded	Market capitalisation ²	Total number of transactions ^{5,8}	Bonds purchased ⁶	
(2015M)	(2016M)	(2017M)	(2044M)	(2046M)	(2043M)	(2024M)	(2038M)	(2039M)	(2025M)	(2040M)	Total consideration	Total nominal value	
											(2041M)	(2042M)	
2017	131 660	-1 443	130 217	32 688	67 831	100 520	15 461 400	85 958	5 479 433	2 726 589	456 450	27 899 905	28 086 610
2018	166 081	1 887	167 968	5 097	50 522	55 620	12 682 019	91 717	5 537 665	2 881 013	475 315	30 613 830	30 979 814
2019	264 596	13 484	278 080	4 409	31 437	35 847	17 440 278	82 472	5 137 534	3 278 785	482 846	36 379 176	36 808 135
2019: Sep.....	27 646	124	27 770	2 086	407	2 493	17 498 211	7 739	524 621	3 147 507	37 144	2 927 152	2 976 178
Oct.....	28 741	3 753	32 494	-	984	984	17 244 065	7 909	496 031	3 187 836	45 008	3 235 334	3 249 819
Nov.....	29 577	2 224	31 801	-	1 090	1 090	17 030 549	9 130	447 545	3 213 507	40 964	3 130 750	3 170 918
Dec.....	22 840	703	23 543	1 163	1 704	2 866	17 440 278	6 692	388 516	3 278 785	29 906	1 885 183	1 927 325
2020: Jan.....	2 203	-59	2 144	-	1 193	1 193	17 389 889	6 308	363 893	3 308 090	37 643	3 219 163	3 212 647
Feb.....	28 032	-821	27 211	6 037	5 202	11 240	15 775 889	7 835	446 084	3 278 842	43 668	3 281 861	3 270 121
Mar.....	24 250	-5 695	18 555	-	1 918	1 918	14 476 772	14 193	774 899	3 047 014	64 586	3 617 896	3 859 750
Apr.....	29 748	-1 248	28 500	-	161	161	16 103 738	9 810	444 097	3 171 785	43 502	2 625 181	2 650 259
May.....	38 988	-508	38 480	-	642	642	16 082 035	9 945	449 375	3 328 461	45 281	3 486 276	2 649 675
Jun.....	...	...	...	-	13 903	13 903	16 925 939	13 320	564 805	3 336 364	44 298	3 037 047	2 860 787

KB203

Non-resident and real-estate transactions

R millions

Period	Transactions by non-residents									Real estate ⁶
	Shares ²			Bonds ¹⁰					Total	Transfer duty ⁷
	Purchases	Sales	Net purchases	Purchases	Sales	Net purchases			Net purchases	
						Total	Repurchases	Outright		
(2550M)	(2551M)	(2050M)	(2553M)	(2554M)	(2051M)	(2562M)	(2563M)	(2565M)	(2564M)	
2017	992 131	1 039 685	-47 555	2 392 738	2 370 152	22 586	-14 203	36 789	-24 969	7 868
2018	1 074 516	1 127 559	-53 042	2 679 594	2 768 057	-88 463	-7 541	-80 922	-141 505	7 474
2019	899 391	1 013 553	-114 162	2 570 067	2 609 149	-39 082	16 015	-55 097	-153 244	7 201
2019: Sep.....	85 033	95 651	-10 618	176 420	186 745	-10 325	706	-11 031	-20 943	605
Oct.....	68 334	90 884	-22 550	202 470	205 854	-3 384	-2 412	-972	-25 934	656
Nov.....	76 665	92 293	-15 628	178 644	179 759	-1 115	-1 004	-111	-16 743	597
Dec.....	68 591	70 874	-2 283	122 522	115 714	6 808	838	5 971	4 525	568
2020: Jan.....	63 246	69 712	-6 466	206 725	199 922	6 803	515	6 288	337	524
Feb.....	70 922	75 609	-4 687	244 319	258 566	-14 246	-962	-13 284	-18 933	616
Mar.....	115 194	131 159	-15 965	297 863	365 462	-67 599	264	-67 863	-83 564	497
Apr.....	73 742	78 998	-5 256	253 382	266 433	-13 051	-1 582	-11 469	-18 306	81
May.....	81 677	93 290	-11 613	265 347	267 210	-1 863	1 475	-3 337	-13 476	368
Jun.....	94 593	103 562	-8 969	345 494	343 696	1 799	-4 054	5 853	-7 171	429

KB204

1. Net cash receipts after repayment of redemptions. Note: Net increase in own securities excluded.
2. Source: The JSE Limited.
3. Including Water Boards as from 1990.
4. Volume in millions.
5. Actual number.
6. Seasonally adjusted.
7. As from 1 March 2020 the threshold for transfer duty exemption changed.
8. Source: Strate Limited. Including free-of-value trades.
9. The term general government includes central, provincial and local governments, though provincial governments do not issue bonds.
10. Source: The JSE Limited, excluding free-of-value trades.

Capital market interest rates (continued)

Percentage

Date	National Credit Act: Maximum prescribed interest rates					
	Mortgage agreements	Credit facilities	Unsecured credit transactions	Developmental credit agreements		Other credit agreements
				Development of a small business	Low-income housing (unsecured)	
2015/11/20	18.75	23.75	33.75	33.75	33.75	23.75
2016/01/29	19.85	24.85	34.85	34.85	34.85	24.85
2016/03/18	20.40	25.40	35.40	35.40	35.40	25.40
2016/05/06	19.00	21.00	28.00	34.00	34.00	24.00
2017/07/21	18.75	20.75	27.75	33.75	33.75	23.75
2018/03/29	18.50	20.50	27.50	33.50	33.50	23.50
2018/11/23	18.75	20.75	27.75	33.75	33.75	23.75
2019/07/19	18.50	20.50	27.50	33.50	33.50	23.50
2020/01/17	18.25	20.25	27.25	33.25	33.25	23.25
2020/03/20	17.25	19.25	26.25	32.25	32.25	22.25
2020/04/15	16.25	18.25	25.25	31.25	31.25	21.25
2020/05/22	15.75	17.75	24.75	30.75	30.75	20.75

KB233

Derivative market activity

R millions

Period	Derivative market ¹									
	Equity derivatives				Commodity derivatives				Interest rate derivatives	Currency derivatives
	Number of deals ² (2140M)	Number of contracts ² (2141M)	Traded value (2142M)	Open interest ³ (2143M)	Number of deals ² (2144M)	Number of contracts ² (2145M)	Traded value (2146M)	Open interest ³ (2147M)	Number of contracts ² (2148M)	Number of contracts ² (2149M)
2014	3 187 871	252 378 555	5 982 373	24 130 663	308 757	2 729 959	490 542	133 194	5 031 551	43 725 844
2015	3 546 068	448 041 117	6 647 119	62 187 905	362 901	3 500 065	749 362	176 383	5 692 757	44 637 555
2016	3 613 300	427 451 830	6 942 719	42 621 649	387 080	3 426 080	957 866	102 521	9 435 718	48 324 320
2017	3 204 643	311 565 908	6 173 488	21 939 559	375 722	3 009 693	569 270	168 361	12 253 666	68 368 701
2018	3 620 652	113 181 024	5 996 463	10 027 944	435 516	3 431 946	678 474	182 210	12 217 063	73 992 712
2019	3 642 147	82 148 373	6 559 478	6 606 135	463 540	3 510 686	809 731	157 807	11 423 782	69 737 470
2018: Nov	337 838	5 463 528	329 456	11 354 723	48 913	422 013	88 711	176 338	678 603	4 171 166
Dec	290 061	13 252 943	670 098	10 027 944	41 389	298 067	64 743	182 210	106 075	6 246 769
2019: Jan	271 971	3 681 835	293 786	10 292 821	38 949	256 776	57 680	184 413	1 894 791	2 887 042
Feb	246 042	4 569 614	286 473	10 256 981	39 500	316 925	71 132	133 454	714 575	5 009 769
Mar	358 463	21 872 036	733 292	10 072 386	26 861	212 295	48 457	136 742	167 000	15 163 398
Apr	226 586	4 218 125	260 581	8 058 282	30 091	236 165	51 858	146 268	1 926 322	3 402 834
May	291 645	4 678 032	402 651	9 947 916	42 955	322 616	69 581	170 769	591 700	5 944 064
Jun	327 736	8 782 781	1 054 063	9 154 061	41 560	405 564	96 822	141 180	148 346	8 941 962
Jul	277 515	5 658 539	330 344	8 557 005	35 102	287 338	67 998	144 614	2 326 015	2 734 892
Aug	324 876	2 989 024	383 900	9 237 475	46 222	354 269	81 179	180 072	682 487	4 565 604
Sep	363 744	10 200 368	949 743	8 570 561	32 155	222 948	50 933	188 984	93 207	6 412 152
Oct	377 339	4 542 302	766 588	7 701 117	46 356	279 688	67 826	193 814	2 034 964	4 806 200
Nov	275 382	2 861 024	285 909	7 505 390	53 714	408 665	97 619	153 080	751 869	4 919 858
Dec	300 848	8 094 693	812 148	6 606 135	30 075	207 437	48 646	157 807	92 506	4 949 695
2020: Jan	285 221	2 625 962	290 551	7 416 416	57 750	254 356	61 428	161 174	1 891 829	2 295 855
Feb	323 099	2 407 562	338 457	7 848 405	47 112	288 636	64 433	140 959	1 204 993	4 172 898
Mar	504 503	16 292 490	839 827	5 418 089	43 572	290 187	70 008	158 615	374 439	11 504 895
Apr	283 005	2 373 731	271 980	5 682 844	34 604	268 507	68 695	174 218	2 007 764	5 923 730
May	274 587	2 932 243	287 468	6 339 113	32 180	259 261	65 562	188 172	1 210 924	3 363 558
Jun	361 838	11 531 260	781 352	5 749 302	46 565	366 312	92 710	160 021	241 351	7 058 266

KB205

1. Source: The JSE Limited. Futures and options contracts included.
2. Actual number.
3. Actual number as at the last business day of the particular month and year.

Share prices

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Unit trusts¹

Selected items and transactions

R millions

Period	Market value of security holdings ²			Cash and deposits ⁴	All funds: Market value of net assets ⁵	Money-market funds: Market value of net assets ⁵	Transactions in units ⁶			Transactions in securities ⁹		
	Public-sector securities ³	Stocks, debentures and preference shares	Ordinary shares				Gross sales ⁷	Re-purchases ⁸	Net sales	Purchases	Sales	Net investment
	(2410K)	(2411K)	(2412K)				(2416K)	(2417K)	(2418K)	(2419K)	(2420K)	(2421K)
2013	181 943	64 657	788 884	438 261	1 483 744	258 560	1 104 939	1 018 532	86 408	1 462 992	884 562	578 430
2014	205 753	65 207	946 614	434 716	1 662 888	239 049	1 519 817	1 477 580	42 237	1 610 730	1 129 196	481 533
2015	211 934	63 040	1 063 217	479 366	1 830 811	256 781	1 654 072	1 587 864	66 208	1 662 808	1 362 665	300 143
2016	233 621	61 181	1 113 460	542 812	1 969 363	291 006	2 032 705	1 882 965	149 740	1 942 572	1 751 450	191 123
2017	235 869	74 729	1 239 859	600 757	2 171 077	302 574	1 959 663	1 807 504	152 159	2 096 913	1 864 545	232 368
2018	287 005	73 846	1 194 026	620 588	2 199 880	322 832	2 088 712	1 991 446	97 266	2 100 466	1 920 192	180 274
2019	345 526	93 581	1 271 224	688 502	2 428 179	345 588	2 239 830	2 103 399	136 431	2 087 907	2 060 627	27 280
2012: 02	111 023	44 847	533 107	348 121	1 043 671	229 659	201 115	198 583	2 531	330 154	200 737	129 417
03	140 010	43 457	569 378	361 647	1 123 287	241 080	244 437	201 711	42 727	357 410	225 150	132 260
04	151 455	43 694	624 605	375 767	1 204 411	244 292	263 921	239 636	24 285	301 429	188 262	113 166
2013: 01	160 554	48 771	668 827	389 011	1 273 898	248 344	242 429	216 877	25 552	314 675	187 149	127 526
02	151 723	59 103	682 030	414 435	1 318 322	263 141	280 284	254 999	25 285	363 869	231 518	132 351
03	164 990	59 094	734 458	451 633	1 420 994	270 216	287 507	259 818	27 689	418 877	233 529	185 348
04	181 943	64 657	788 884	438 261	1 483 744	258 560	294 719	286 838	7 881	365 573	232 367	133 205
2014: 01	184 486	65 024	818 062	441 743	1 515 798	247 316	293 455	280 134	13 321	327 481	251 866	75 615
02	189 256	67 011	880 943	469 081	1 613 268	267 668	343 960	321 577	22 383	390 848	273 807	117 041
03	186 102	64 815	893 309	448 169	1 602 151	239 263	426 611	430 792	-4 181	440 025	305 840	134 185
04	205 753	65 207	946 614	434 716	1 662 888	239 049	455 791	445 077	10 714	452 376	297 684	154 693
2015: 01	219 871	69 795	1 002 012	445 429	1 744 232	235 999	300 911	292 088	8 822	440 506	326 632	113 874
02	207 434	62 011	1 006 238	469 368	1 754 594	249 736	340 565	337 426	3 139	338 960	252 672	86 287
03	212 233	63 557	998 126	487 512	1 773 099	263 780	484 569	452 591	31 978	470 316	342 074	128 242
04	211 934	63 040	1 063 217	479 366	1 830 811	256 781	528 027	505 759	22 268	413 026	441 287	-28 260
2016: 01	214 945	63 969	1 076 255	498 845	1 865 191	264 232	352 372	327 236	25 136	473 456	429 856	43 599
02	225 769	69 209	1 094 958	507 203	1 909 245	272 572	452 549	411 193	41 356	525 024	432 190	92 834
03	224 142	69 878	1 119 443	522 659	1 951 851	285 386	571 985	526 758	45 228	492 938	448 135	44 803
04	233 621	61 181	1 113 460	542 812	1 969 363	291 006	655 798	617 778	38 021	451 154	441 269	9 886
2017: 01	240 142	66 084	1 158 827	545 289	2 025 695	295 071	431 111	407 435	23 676	498 806	437 608	61 199
02	232 379	64 479	1 175 415	560 801	2 048 589	297 396	486 728	453 080	33 648	527 933	471 346	56 586
03	230 140	67 679	1 226 498	580 440	2 122 977	300 593	490 175	446 404	43 771	526 832	490 825	36 007
04	235 869	74 729	1 239 859	600 757	2 171 077	302 574	551 649	500 584	51 065	543 342	464 767	78 576
2018: 01	243 329	69 539	1 198 056	594 035	2 119 762	303 682	506 281	495 247	11 034	525 982	469 034	56 948
02	259 200	66 023	1 259 783	583 187	2 186 412	298 155	484 941	471 335	13 606	508 417	453 657	54 760
03	275 340	74 489	1 278 245	621 406	2 269 584	315 699	532 569	478 098	54 471	637 863	596 475	41 388
04	287 005	73 846	1 194 026	620 588	2 199 880	322 832	564 921	546 766	18 155	428 204	401 026	27 178
2019: 01	293 794	83 268	1 288 287	653 928	2 336 055	336 420	508 466	460 438	48 028	506 420	472 466	33 954
02	311 348	83 985	1 263 536	671 014	2 351 063	332 291	570 681	530 917	39 764	496 645	462 062	34 582
03	324 692	87 710	1 258 339	703 242	2 397 042	355 702	579 335	534 349	44 986	610 226	639 775	-29 549
04	345 526	93 581	1 271 224	688 502	2 428 179	345 588	581 347	577 696	3 651	474 616	486 323	-11 707
2020: 01	357 398	82 342	1 045 107	699 815	2 204 126	367 814	605 489	580 497	24 992	677 853	679 103	-1 249

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- Including unit trusts classified as 'fund of funds' as from July 1998. Including institutional funds from October 2000. Domestic intra-industry holdings of assets are excluded.
- At end of period.
- Securities issued by the Government, local governments, the Land Bank, Eskom, Rand Water and other securities approved by the Registrar of Collective Investment Schemes.
- Including money-market unit trusts' portfolios as from May 1997.
- Market value of security holdings, plus cash, deposits and accrued income, less current liabilities and domestic intra-industry assets, as at end of period.
- By the management companies. Excluding domestic intra-industry transactions.
- At selling prices. Including switching at market values for an equivalent amount of units at selling prices.
- At repurchase prices.
- At actual transaction values. Excluding domestic intra-industry transactions.

Public Investment Corporation Liabilities¹

R millions

End of	Pension funds ²	Social security funds ³	Other government funds	Households ⁴	Other	Total liabilities
	(2806K)	(2807K)	(2808K)	(2809K)	(2810K)	(2811K)
2013	1 412 371	131 328	20 885	1	914	1 565 500
2014	1 553 813	155 357	22 472	1	1 315	1 732 958
2015	1 596 560	166 031	28 038	1	1 582	1 792 213
2016	1 667 255	188 208	29 752	1	2 058	1 887 274
2017	1 901 030	216 815	26 071	1	2 390	2 146 308
2018	1 797 620	227 039	27 844	2	2 639	2 055 143
2019	1 884 803	244 264	30 917	2	2 752	2 162 738
2018: 02	1 852 654	224 842	26 501	1	2 515	2 106 514
03	1 844 231	227 017	27 730	1	2 446	2 101 426
04	1 797 620	227 039	27 844	2	2 639	2 055 143
2019: 01	1 845 908	232 739	28 202	2	2 612	2 109 463
02	1 916 223	245 267	29 413	2	2 714	2 193 618
03	1 877 909	243 355	29 751	2	2 704	2 153 720
04	1 884 803	244 264	30 917	2	2 752	2 162 738
2020: 01	1 659 464	217 998	30 987	2	2 487	1 910 938

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Assets¹

R millions

End of	Cash and deposits ⁵	Interest bearing securities			Equity ⁷	Loans	Non-financial assets ⁸	Other assets ⁹	Total assets	Of which: Foreign assets ¹⁰
		Domestic		Foreign sector						
		Public sector ⁶	Private sector							
(2812K)	(2813K)	(2814K)	(2815K)	(2816K)	(2818K)	(2819K)	(2820K)	(2821K)	(2822K)	
2013	88 913	492 536	40 888	404	920 752	6 499	15 394	115	1 565 500	292 353
2014	63 136	584 788	39 755	527	1 012 620	16 008	15 530	593	1 732 958	307 814
2015	51 957	587 367	43 352	757	1 059 769	31 682	16 577	753	1 792 213	306 814
2016	83 167	625 370	45 702	2 526	1 060 096	49 974	19 603	835	1 887 274	280 047
2017	81 871	640 045	46 097	2 179	1 290 373	64 009	22 864	-1 130	2 146 308	331 046
2018	105 022	661 451	41 095	1 213	1 144 804	66 914	24 649	9 995	2 055 143	292 872
2019	113 102	702 307	35 864	1 228	1 205 970	68 852	25 982	9 434	2 162 738	363 256
2018: 02.....	90 671	655 448	43 702	2 268	1 214 753	65 486	23 970	10 215	2 106 514	311 470
03.....	107 773	649 423	42 042	1 173	1 199 737	68 159	23 560	9 559	2 101 426	334 864
04.....	105 022	661 451	41 095	1 213	1 144 804	66 914	24 649	9 995	2 055 143	292 872
2019: 01.....	118 094	664 560	40 931	1 298	1 181 475	68 103	25 041	9 961	2 109 463	324 622
02.....	130 240	688 259	39 860	1 273	1 228 828	70 391	25 168	9 599	2 193 618	316 000
03.....	134 288	690 553	36 223	1 289	1 192 296	65 142	25 691	8 238	2 153 720	401 371
04.....	113 102	702 307	35 864	1 228	1 205 970	68 852	25 982	9 434	2 162 738	363 256
2020: 01.....	106 210	653 363	35 034	1 303	1 013 818	65 912	24 491	10 807	1 910 938	367 204

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- As from March 2002 statistics reported at market value.
- Consisting of the Government Employees Pension Fund and other funds.
- Comprising the Unemployment Insurance Fund and Compensation Fund.
- Including funds of trusts and non-profit institutions serving households.
- Consisting of transferable and other deposits with banks.
- Securities issued by national and local governments as well as state-owned companies.
- Comprising listed and unlisted domestic and foreign shares as well as investment in unit trusts and other funds.
- Investment in unlisted property.
- Including accounts receivable and net financial derivative exposures.
- Consisting of secondary listings on the JSE and other foreign investments.

Long-term insurers Income statement¹

R millions

Period	Current receipts				Current expenditure						Dividend payments	Domestic current income surplus	Net capital profits and other income ²
	Investment income	Premiums received			Claims paid		Annuities	Surrenders	Administrative expenses	Taxation			
		Pension and group life business	Retirement annuities	Other insurance business	Lump sum at retirement	Lump sum on death and other payments							
(2190K)	(2191K)	(2192K)	(2193K)	(2194K)	(2195K)	(2196K)	(2197K)	(2198K)	(2199K)	(2200K)	(2201K)	(2202K)	
1998	30 382	33 717	16 060	44 306	14 237	14 375	14 292	41 027	9 069	2 035	1 834	27 597	-29 885
1999	34 894	34 660	19 903	55 225	23 885	16 885	15 690	54 910	10 756	3 650	3 633	15 273	111 286
2000	36 295	52 768	23 162	63 805	29 666	22 146	16 887	58 760	11 302	3 672	5 208	28 389	20 653
2001	38 342	68 884	22 388	71 409	32 548	26 761	17 485	72 095	11 003	4 914	7 077	29 141	87 179
2002	42 248	75 175	21 063	74 802	33 967	28 187	21 394	83 420	12 930	5 270	7 660	20 460	-50 610
2003	46 812	78 112	19 122	81 642	31 015	32 032	22 470	83 323	16 021	4 950	4 318	31 561	45 444
2004	43 186	67 841	21 423	72 963	27 522	31 183	20 664	82 648	17 080	7 929	6 142	12 245	99 712
2005	49 017	85 928	23 506	79 305	31 182	44 601	20 770	90 243	19 935	7 562	11 910	11 555	158 080
2006	58 442	115 463	29 063	93 085	35 082	56 546	23 708	116 072	20 940	10 131	9 550	24 025	172 963
2007	69 176	129 081	32 299	114 101	39 055	65 305	24 277	123 365	22 989	9 884	15 723	44 059	94 218
2008	79 371	144 705	46 040	101 563	39 490	69 165	26 218	133 406	21 902	5 420	9 987	66 093	-99 339
2009	75 984	126 622	40 081	85 563	32 593	61 352	25 495	125 730	24 504	8 159	11 909	38 508	62 994
2010	63 687	125 231	47 215	93 283	33 506	63 429	28 614	122 167	27 037	7 005	13 649	34 009	104 326
2011	68 598	120 930	49 252	105 443	34 070	64 647	29 750	113 772	30 001	7 682	9 544	54 756	37 871
2012	79 962	157 818	59 992	112 742	36 973	74 183	32 736	142 586	32 512	11 559	19 506	60 460	168 169
2013	96 820	184 642	68 158	132 987	45 113	96 874	36 179	160 334	36 386	12 791	30 754	64 177	175 424
2014	99 550	176 268	77 790	145 987	48 052	98 541	40 533	199 671	37 268	11 390	10 911	53 230	127 990
2015	111 743	178 259	80 076	158 224	51 873	109 841	46 814	186 942	41 941	10 574	11 719	68 599	68 254
2016	127 013	169 112	92 940	162 199	55 151	127 937	55 879	170 927	46 528	13 477	11 860	69 506	13 935
2017	127 392	182 472	91 386	160 882	56 384	125 840	54 271	160 733	48 654	15 326	14 445	86 480	133 709
2018	138 496	199 403	96 450	172 041	57 063	117 860	58 441	185 652	52 131	11 832	19 092	104 319	-84 251
2019	126 493	209 668	112 429	173 682	56 850	81 660	62 703	252 458	53 497	14 417	12 371	88 316	59 357
2015: 02	26 607	40 955	20 075	38 844	13 472	26 721	10 437	48 667	10 519	2 543	3 086	11 037	-18 204
03	30 002	44 540	20 214	39 238	13 480	26 981	11 531	50 467	10 954	1 879	2 426	16 277	-20 027
04	26 006	52 481	20 390	44 548	12 812	28 788	14 222	46 727	11 444	2 408	2 971	24 054	43 593
2016: 01	38 058	46 118	22 768	37 996	12 283	31 514	18 299	42 295	10 885	3 361	1 675	24 628	27 262
02	29 064	40 270	23 791	40 652	15 101	31 919	12 388	42 308	10 283	4 500	4 701	12 578	13 462
03	34 031	40 163	23 921	42 435	13 904	31 203	12 740	41 916	11 942	2 459	1 766	24 620	5 249
04	25 860	42 562	22 459	41 116	13 862	33 301	12 452	44 408	13 420	3 157	3 717	7 680	-32 038
2017: 01	35 296	42 713	22 898	38 836	13 340	30 470	13 232	38 737	11 499	2 252	1 640	28 574	29 013
02	28 108	44 511	22 634	41 217	15 028	31 135	13 475	42 478	12 053	4 037	4 244	14 022	-1 599
03	35 175	47 413	22 171	39 303	14 131	32 528	13 584	39 573	12 839	4 743	1 985	24 678	73 271
04	28 813	47 835	23 682	41 527	13 885	31 708	13 980	39 945	12 263	4 293	6 577	19 206	33 024
2018: 01	38 174	43 165	24 114	40 044	12 640	31 114	14 497	39 442	12 719	1 178	2 825	31 084	-50 619
02	31 912	46 640	23 581	42 409	14 729	32 732	14 176	40 689	12 649	5 430	7 882	16 254	46 706
03	37 571	59 019	23 966	43 432	14 380	35 079	14 737	50 435	13 534	2 668	2 127	31 027	13 545
04	30 839	50 578	24 789	46 155	15 314	18 935	15 030	55 086	13 229	2 556	6 259	25 954	-93 883
2019: 01	34 334	48 336	24 694	42 929	13 525	18 967	15 117	63 643	12 233	5 521	2 279	19 008	83 080
02	29 664	56 145	27 174	42 253	15 361	19 966	16 053	64 640	13 000	1 990	4 298	19 928	4 029
03	34 817	54 603	31 001	43 153	13 443	21 891	15 566	66 144	13 651	3 484	3 899	25 496	-36 259
04	27 677	50 585	29 560	45 347	14 521	20 835	15 967	58 031	14 612	3 422	1 896	23 884	8 507
2020: 01	36 534	52 858	31 241	41 667	13 626	21 079	16 103	65 557	12 496	-1 152	5 814	28 778	-210 826

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1. Source: Registrar of Insurance, annual reports up to 1990 and thereafter South African Reserve Bank survey data.

2. Including all foreign items.

Long-term insurers¹

Liabilities

R millions

End of	Banks and other loans ²	Insurer creditors ³	Other creditors	Claims not yet paid out	Unappropriated profits	Liability under unexpired policies		Insurance fund surplus ⁵	Other reserves	Share capital ⁶	Claims in respect of derivative instruments	Other liabilities	Total liabilities
						Pension business ⁴	Other business						
	(2210J)	(2211J)	(2212J)	(2213J)	(2214J)	(2215J)	(2216J)	(2217J)	(2218J)	(2219J)	(2222J)	(2220J)	(2221J)
2011 ¹¹	5 393	3 078	10 446	18 957	24 044	743 340	607 132	43 821	200 791	6 866	4 384	38 499	1 706 752
2012	5 587	3 898	13 955	20 083	28 660	847 798	690 408	50 605	210 291	6 842	7 714	62 973	1 948 814
2013	6 509	2 235	21 388	22 753	32 468	1 037 303	749 971	33 117	213 454	6 508	7 415	58 890	2 192 012
2014	7 935	2 677	23 208	25 526	36 478	1 205 004	816 577	36 689	131 491	6 674	8 383	71 874	2 372 516
2015	10 233	2 826	23 881	25 834	41 642	1 266 296	888 459	14 560	183 427	6 981	19 290	79 404	2 562 832
2016	22 673	3 295	21 965	29 701	45 167	1 296 742	911 398	14 318	185 385	7 355	12 793	68 153	2 618 945
2017	23 700	4 472	21 832	33 677	48 850	1 422 086	975 281	14 297	188 753	7 122	12 130	59 433	2 811 633
2018	21 540	2 884	22 554	36 720	51 796	1 412 211	964 411	13 655	200 122	7 505	14 993	67 443	2 815 836
2019	25 455	2 607	26 166	41 152	56 654	1 518 331	1 050 134	13 975	180 883	7 418	14 075	81 012	3 017 862

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Assets

R millions

End of	Coin, banknotes and deposits	Fixed-interest securities				Ordinary shares ⁸	Loans				Fixed property	Other assets ¹⁰	Total assets
		Government	Local governments	Public enterprises	Other ⁷		Mortgage	Against policies	To public sector ⁹	Other			
	(2230K)	(2231K)	(2232K)	(2233K)	(2234K)	(2235K)	(2236K)	(2237K)	(2238K)	(2239K)	(2240K)	(2241K)	(2242K)
2011 ¹¹	215 362	139 467	5 056	27 141	88 727	777 013	1 406	2 189	682	141 568	61 089	247 052	1 706 752
2012	210 888	162 524	6 513	33 069	90 184	940 305	1 354	2 027	823	160 852	62 365	277 911	1 948 814
2013	173 756	177 182	4 078	31 508	125 921	1 124 386	1 422	2 141	273	167 408	57 378	326 559	2 192 012
2014	165 749	198 254	4 629	29 365	204 097	1 246 906	1 171	2 071	2 943	131 394	57 953	327 984	2 372 516
2015	201 790	196 832	5 155	35 435	241 367	1 321 258	826	2 334	3 339	83 002	67 545	403 951	2 562 832
2016	205 448	190 216	5 542	42 357	250 363	1 373 142	897	2 311	3 306	72 688	65 216	407 462	2 618 945
2017	234 411	197 028	4 930	47 862	261 465	1 515 061	772	2 806	3 123	57 936	66 743	419 495	2 811 633
2018	226 525	202 990	4 955	42 627	264 524	1 536 268	40	1 871	2 770	50 375	77 874	405 016	2 815 836
2019	244 034	225 955	5 273	42 147	292 239	1 628 914	419	1 731	2 303	49 840	64 540	460 468	3 017 862
2017: 01	218 871	185 929	5 688	43 403	245 409	1 406 207	710	2 274	3 089	70 964	65 430	429 020	2 676 995
02	214 107	178 403	5 314	45 055	246 607	1 406 543	708	2 553	3 002	74 027	67 537	423 147	2 667 002
03	241 976	187 589	4 720	47 473	252 483	1 469 168	747	2 621	3 158	62 269	64 711	436 950	2 773 864
04	234 411	197 028	4 930	47 862	261 465	1 515 061	772	2 806	3 123	57 936	66 743	419 495	2 811 633
2018: 01	244 191	206 630	5 220	47 434	271 210	1 476 369	149	2 138	2 865	54 063	68 064	404 785	2 783 118
02	240 482	196 713	4 800	43 035	263 460	1 529 614	148	2 037	3 012	53 136	70 696	446 859	2 853 992
03	241 689	207 908	4 779	42 640	261 848	1 563 345	41	2 003	2 818	55 006	72 594	442 589	2 897 259
04	226 525	202 990	4 955	42 627	264 524	1 536 268	40	1 871	2 770	50 375	77 874	405 016	2 815 836
2019: 01	235 898	209 608	4 496	42 812	276 632	1 610 063	23	1 854	2 331	47 603	79 037	426 725	2 937 083
02	244 374	221 693	4 577	42 646	271 923	1 625 127	32	1 795	2 241	49 179	81 288	433 571	2 978 445
03	243 799	228 200	4 941	42 388	280 582	1 594 546	418	1 755	2 242	43 369	63 084	468 108	2 973 431
04	244 034	225 955	5 273	42 147	292 239	1 628 914	419	1 731	2 303	49 840	64 540	460 468	3 017 862
2020: 01	241 431	209 666	4 298	40 984	271 537	1 396 325	396	1 669	2 459	50 104	59 072	472 348	2 750 289

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1. Refer to domestic insurers. Data of investment subsidiaries and data of property companies that are directly or indirectly controlled by insurers are consolidated with those of parent organisations.
2. Including mutual banks.
3. Balances due to insurers and reinsurers.
4. Pension and retirement annuity fund business.
5. Difference between insurance fund and liability under unexpired policies.
6. Including outside shareholders in subsidiaries.
7. Including company stock, debentures and preference shares, and government-guaranteed stock.
8. Including units of unit and property trusts.
9. Including loan levy, loans to local governments, public corporations and, as from September 1979, also universities.
10. Including net foreign claims.
11. All annual data as from 1990 and all quarterly data as from December 1991 are recorded at market value.

Short-term insurers Income statement¹

R millions

Period	Current receipts			Current expenditure					Dividend payments (2608K)	Domestic current income surplus (2609K)	Net capital profits and other income ³ (2610K)
	Investment income (2600K)	Premiums received		Claims paid		Premiums on reinsurance (2605K)	Administrative expenses (2606K)	Taxation (2607K)			
		Reinsurance ² (2601K)	Other insurance (2602K)	Reinsurance (2603K)	Other (2604K)						
2012	5 065	13 925	77 907	3 753	45 606	16 326	15 857	3 198	5 236	6 920	-1 824
2013	5 406	17 535	88 324	4 360	52 509	18 978	20 386	2 795	4 629	7 608	-1 730
2014	5 325	17 970	96 623	4 899	55 509	18 587	22 026	3 007	4 779	11 112	-2 792
2015	6 120	21 397	100 607	5 905	54 732	20 965	23 520	4 372	4 997	13 632	-1 665
2016	7 722	26 046	104 963	6 798	63 185	19 267	23 595	4 157	6 341	15 388	-11 009
2017	8 950	29 309	113 835	6 941	69 699	20 699	25 929	5 044	6 044	17 737	-6 468
2018	8 943	28 037	120 772	11 553	66 355	26 065	28 352	4 637	4 934	15 857	-7 697
2019	9 369	31 208	127 789	12 094	71 285	28 556	31 468	4 893	6 839	13 231	-6 050
2012: 02	1 275	2 268	18 842	927	9 706	3 054	4 056	853	635	3 154	-1 305
03	1 351	3 701	20 004	993	11 006	3 700	4 150	819	1 107	3 281	-487
04	1 259	4 695	20 626	812	13 589	6 063	3 327	580	1 135	1 074	-619
2013: 01	1 211	4 149	20 741	1 085	12 720	4 128	4 688	919	1 243	1 317	-1 379
02	1 199	3 772	21 181	1 217	11 873	3 861	4 967	668	751	2 815	-1 298
03	1 377	4 061	23 188	1 147	12 263	5 596	5 247	867	1 222	2 284	-213
04	1 618	5 553	23 214	911	15 652	5 392	5 483	342	1 413	1 192	1 160
2014: 01	1 294	4 514	24 374	1 272	15 466	3 984	5 159	767	1 209	2 324	-1 361
02	1 509	4 028	23 070	1 110	11 834	4 006	5 339	673	1 472	4 173	-1 365
03	1 250	5 239	24 218	1 361	14 198	4 754	5 545	651	1 199	2 998	-567
04	1 272	4 189	24 961	1 155	14 011	5 843	5 982	915	899	1 616	501
2015: 01	1 634	4 976	25 772	1 353	14 754	5 678	5 811	978	1 675	2 133	-347
02	1 581	5 350	24 318	1 391	11 933	4 647	5 878	1 188	924	5 287	-2 270
03	1 564	5 513	25 231	1 794	14 012	5 137	5 698	853	1 689	3 125	-637
04	1 341	5 558	25 287	1 368	14 033	5 503	6 133	1 353	709	3 087	1 590
2016: 01	1 668	6 307	26 574	2 068	15 810	4 703	5 807	772	1 883	3 505	-1 686
02	2 544	6 666	25 993	1 850	15 663	4 694	5 751	1 058	1 066	5 122	-1 172
03	1 752	6 258	25 682	1 474	14 790	4 731	5 932	908	2 569	3 288	-2 477
04	1 757	6 816	26 713	1 406	16 921	5 140	6 104	1 418	823	3 473	-5 674
2017: 01	1 952	5 335	28 011	1 528	15 179	4 833	6 133	2 231	1 143	4 253	-2 276
02	2 812	9 255	27 603	1 818	18 558	5 417	6 542	856	2 045	4 433	-1 927
03	2 073	5 163	28 952	1 849	14 787	5 158	6 756	1 312	1 145	5 180	-1 461
04	2 113	9 556	29 269	1 747	21 175	5 291	6 497	645	1 712	3 872	-804
2018: 01	2 032	6 028	30 948	2 771	15 182	6 584	6 848	1 327	1 326	4 970	-1 996
02	2 170	6 709	29 142	2 974	16 202	6 116	6 924	1 472	662	3 671	-1 396
03	2 473	7 603	30 054	3 030	16 844	6 651	7 058	703	1 803	4 041	-2 008
04	2 268	7 697	30 629	2 778	18 127	6 713	7 522	1 135	1 142	3 176	-2 298
2019: 01	2 228	7 248	31 084	2 678	17 797	6 929	7 847	1 290	2 393	1 624	-1 630
02	2 373	9 121	31 333	3 555	18 931	6 819	7 540	988	1 072	3 923	-695
03	2 355	6 648	32 558	3 359	16 889	7 359	7 664	1 009	2 679	2 602	-2 082
04	2 413	8 191	32 814	2 502	17 668	7 449	8 416	1 606	694	5 083	-1 643
2020: 01	2 454	7 633	32 741	3 189	18 246	7 359	7 770	262	2 534	3 468	-4 563

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1. Source: South African Reserve Bank survey data. Excluding the Road Accident Fund as from June 1996.
2. Including claims and expenses recovered on short-term reinsurance outwards.
3. Including all foreign items.

Short-term insurers¹

Liabilities

R millions

End of	Insurer creditors ² (2250J)	Other creditors (2251J)	Claims not yet paid out (2252J)	Foreign head office balances (2253J)	Unappropriated profits (2254J)	Liability under unexpired policies (2255J)	Insurance fund surplus ³ (2256J)	Other reserves (2257J)	Share capital (2258J)	Claims in respect of derivative instruments (2261J)	Other liabilities (2259J)	Total liabilities (2260J)
2009 ⁷	5 633	900	15 922	-	16 288	10 018	4 359	18 100	2 143	785	14 291	88 439
2010	3 630	1 041	15 346	-	18 406	9 133	4 360	18 741	2 257	183	12 124	85 221
2011	4 309	1 014	17 359	-	20 088	11 321	8 298	16 173	2 244	40	13 935	94 782
2012	7 345	1 059	21 890	-	24 546	10 983	8 761	16 032	2 301	59	13 822	106 798
2013	5 323	1 022	21 444	-	23 833	12 464	9 015	17 037	3 527	2 130	17 505	113 300
2014	6 384	1 317	24 154	-	25 070	15 052	10 242	18 165	4 457	2 182	18 391	125 413
2015	6 415	1 461	28 832	-	29 330	15 591	12 583	19 334	5 060	4 447	25 213	148 265
2016	6 500	2 990	30 172	-	30 763	29 599	9 895	14 796	6 529	3 818	20 590	155 652
2017	7 462	3 077	34 970	-	33 901	31 526	11 247	16 990	7 472	3 099	20 488	170 233
2018	9 114	3 422	35 818	-	39 180	33 429	11 861	16 973	7 754	3 497	22 562	183 610
2019	8 307	3 337	42 143	-	44 569	34 911	12 889	13 177	8 299	3 065	26 155	196 851

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Assets

R millions

End of	Coin, banknotes and deposits (2270K)	Fixed-interest securities				Ordinary shares ⁵ (2275K)	Loans		Fixed property (2279K)	Provision for unexpired risks ceded (2280K)	Other assets ⁶ (2281K)	Total assets (2282K)
		Government (2271K)	Local governments (2272K)	Public enterprises (2273K)	Other ⁴ (2274K)		Mortgage (2276K)	Other (2278K)				
2011 ⁷	34 543	7 651	2	3 411	5 184	18 619	-	1 779	1 129	1 286	21 179	94 782
2012	39 036	7 620	2	4 441	5 343	19 127	-	2 157	1 098	1 575	26 400	106 798
2013	39 528	7 581	38	4 609	5 567	22 530	-	2 738	1 551	1 431	27 727	113 300
2014	43 010	10 271	144	598	10 834	25 047	-	2 503	1 857	1 503	29 647	125 413
2015	59 372	8 587	14	924	12 993	24 581	9	2 021	2 086	1 467	36 212	148 265
2016	54 000	11 539	80	1 517	14 737	27 418	10	2 065	2 038	1 557	40 691	155 652
2017	57 416	12 682	158	2 268	15 747	28 731	6	1 844	1 900	1 693	47 786	170 233
2018	59 514	15 098	143	2 447	19 971	28 931	45	1 986	1 826	1 833	51 816	183 610
2019	65 772	16 732	156	2 436	21 429	30 663	48	1 660	3 483	1 962	52 510	196 851
2017: 01	54 114	11 567	81	1 507	14 804	28 969	10	2 031	2 014	...	44 170	159 265
02	57 434	13 239	142	1 648	15 535	27 772	10	1 944	1 984	...	45 120	164 827
03	57 412	12 821	159	1 684	15 958	30 152	0	1 718	1 971	...	48 483	170 359
04	57 416	12 682	158	2 268	15 747	28 731	6	1 844	1 900	1 693	47 786	170 233
2018: 01	58 563	14 220	165	2 546	15 824	27 341	11	1 712	1 861	...	52 006	174 250
02	59 482	14 198	135	2 245	18 675	29 553	10	1 604	1 831	...	51 662	179 396
03	62 651	14 332	143	2 407	19 156	30 217	40	1 632	1 821	...	55 032	187 432
04	59 514	15 098	143	2 447	19 971	28 931	45	1 986	1 826	1 833	51 816	183 610
2019: 01	61 925	14 722	152	2 439	20 715	28 985	49	1 562	2 378	...	53 267	186 195
02	61 579	15 153	156	2 538	20 561	29 930	46	1 306	3 488	...	57 907	192 664
03	66 143	15 735	159	2 514	21 498	30 400	48	1 499	3 426	...	58 462	199 882
04	65 772	16 732	156	2 436	21 429	30 663	48	1 660	3 483	1 962	52 510	196 851
2020: 01	68 753	15 173	147	2 179	21 293	28 500	50	1 432	3 854	...	57 873	199 253

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1. Refer to domestic insurers, excluding the Road Accident Fund as from June 1996.
2. Balances due to insurers and reinsurers.
3. Difference between insurance funds and liability under unexpired policies.
4. Including preference shares and government-guaranteed stock.
5. Including units in unit trusts.
6. Including net foreign claims.
7. All annual data as from 1990 and all quarterly data as from December 1991 are reported at market value.

Official pension and provident funds¹

Income statement²

R millions

Period	Current receipts				Current expenditure				Domestic current income surplus	Net capital profits and other income	Total net cash inflow	Net asset revaluation ⁶
	Investment income		Contributions by		Benefits			Adminis-trative expenses				
	Interest ⁴	Dividends ³	Members	Employ-ers ⁵	Annuities	Lump sum at retire-ment or death	Other lump sum payments					
(2290K)	(2291K)	(2292K)	(2293K)	(2294K)	(2295K)	(2296K)	(2297K)	(2298K)	(2299K)	(2301K)	(2302K)	
31 March												
2012	30 669	21 701	17 093	30 441	23 273	9 221	15 373	2 723	49 313	32 065	81 377	43 909
2013	34 297	23 945	18 424	33 133	25 846	10 972	17 414	2 906	52 661	54 742	107 403	111 518
2014	36 689	25 080	20 395	36 440	28 994	14 237	30 198	6 866	38 310	54 731	93 040	101 594
2015	39 279	28 621	22 054	39 486	32 005	17 231	51 447	3 867	24 890	57 310	82 201	75 421
2016	42 130	34 405	23 547	42 095	36 897	24 421	46 210	6 397	28 250	59 289	87 539	-47 198
2017	43 959	30 554	25 503	45 591	40 929	21 484	41 974	6 317	34 904	48 174	83 078	-60 432
2018	48 104	33 559	27 013	48 779	45 797	20 533	40 580	7 306	43 238	27 393	70 632	75 843
2019	56 433	43 834	30 668	55 191	52 477	18 985	37 375	9 135	68 153	19 866	88 018	-66 520
2020	56 234	39 500	31 076	55 278	57 640	19 522	38 491	6 637	59 797	38 374	98 171	-246 995
31 December												
2011	30 741	18 732	17 010	30 411	24 046	9 002	11 597	2 601	49 649	30 142	79 791	-3 473
2012	33 915	25 227	17 839	32 006	24 464	10 437	15 531	2 875	55 681	45 282	100 963	140 689
2013	36 203	23 860	20 102	35 932	28 146	13 910	24 630	3 626	45 786	59 079	104 864	84 750
2014	38 744	27 640	21 627	38 405	31 226	15 487	40 651	7 256	31 798	52 150	83 948	54 799
2015	39 914	33 263	23 138	41 398	35 788	25 773	63 816	5 372	6 964	59 849	66 813	-52 582
2016	43 357	31 010	24 797	44 330	39 718	19 857	37 727	6 390	39 802	59 013	98 816	-38 299
2017	49 383	33 188	26 882	48 232	44 711	19 554	37 663	7 296	48 461	26 677	75 139	167 523
2018	52 806	40 111	29 109	52 588	49 789	21 667	39 066	8 579	55 512	24 242	79 754	-164 552
2019	55 776	43 862	31 130	55 873	55 767	20 604	41 262	7 204	61 804	31 399	93 203	-22 057
2015: 02	10 117	8 158	5 480	9 683	9 024	4 463	14 270	1 375	4 306	15 191	19 497	-22 872
03	10 260	9 320	6 086	10 807	8 839	8 760	15 571	1 204	2 099	12 967	15 066	-57 655
04	9 804	6 360	6 033	10 689	9 651	6 203	9 993	1 720	5 319	13 337	18 656	-11 751
2016: 01	11 950	10 567	5 948	10 916	9 384	4 995	6 376	2 099	16 527	17 794	34 320	45 080
02	10 571	7 360	6 163	10 870	10 039	5 260	10 463	1 425	7 777	17 481	25 257	23 446
03	10 864	7 667	6 244	11 107	9 761	4 882	12 009	754	8 476	12 288	20 764	-52 581
04	9 972	5 416	6 443	11 437	10 534	4 721	8 879	2 112	7 023	11 451	18 475	-54 244
2017: 01	12 552	10 111	6 653	12 177	10 595	6 621	10 622	2 026	11 628	6 955	18 583	22 947
02	12 432	6 296	6 600	11 742	11 179	4 529	9 024	1 283	11 055	3 934	14 989	-6 148
03	12 313	11 228	6 860	12 252	11 480	4 650	9 673	1 253	15 596	8 993	24 589	59 967
04	12 086	5 554	6 769	12 062	11 457	3 753	8 344	2 734	10 183	6 795	16 978	90 758
2018: 01	11 273	10 482	6 785	12 724	11 681	7 600	13 540	2 037	6 405	7 671	14 076	-68 734
02	12 518	9 211	6 777	12 057	12 214	4 977	8 654	1 824	12 894	6 084	18 977	18 539
03	13 722	10 533	7 550	13 484	12 392	5 112	8 815	2 087	16 883	6 076	22 959	-44 889
04	15 294	9 885	7 997	14 324	13 502	3 977	8 058	2 632	19 331	4 411	23 742	-69 469
2019: 01	14 900	14 204	8 344	15 326	14 369	4 919	11 848	2 593	19 045	3 295	22 340	29 298
02	13 463	10 184	7 641	13 622	13 579	4 987	10 613	1 164	14 567	6 371	20 938	20 753
03	13 481	11 286	7 646	13 664	13 870	6 447	10 350	1 668	13 742	8 331	22 073	-56 276
04	13 932	8 188	7 499	13 260	13 949	4 252	8 451	1 779	14 449	13 403	27 852	-15 831
2020: 01	15 357	9 842	8 290	14 732	16 241	3 837	9 078	2 026	17 039	10 270	27 308	-195 641

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1. Funds administered by the Department of Finance, Transnet, Telkom and the Post Office which are not subject to regulation and supervision in terms of the Pension Funds Act.
2. Source: Auditor-General Annual Reports up to 1992, thereafter South African Reserve Bank survey.
3. Including dividends from insurers.
4. Including dividends prior to 1992.
5. Including special actuarial deficit reduction contributions.
6. Including amounts transferred to, and from, other accounts and, as from March 1995, privatisation to other funds.

Official and private self-administered pension and provident funds

Assets and liabilities

R millions

End of	Official funds ¹								Private self-administered funds ³		
	Assets ²							Total assets equal accumulated funds ⁴	Liabilities ⁶		
	Cash and deposits	Fixed-interest securities				Ordinary shares	Other Assets ⁴		Accumulated funds	Reserves, provisions and other liabilities	Total liabilities ⁵
		Government	Local governments	Public enterprises	Other						
(2330K)	(2331K)	(2332K)	(2333K)	(2334K)	(2335K)	(2338K)	(2339K)	(2340K)	(2341K)	(2342K)	
2011	65 952	224 267	2 197	124 771	56 000	554 752	81 713	1 109 652	476 609	181 322	657 930
2012	88 857	260 302	2 476	136 096	66 967	681 690	101 736	1 338 123	554 178	202 706	756 884
2013	74 264	294 691	2 237	136 199	69 596	841 435	124 211	1 542 633	604 311	238 034	842 346
2014	48 249	350 720	2 466	152 391	85 364	920 625	133 137	1 692 952	650 875	255 314	906 189
2015	32 235	349 222	1 949	157 129	104 015	940 750	149 229	1 734 529	637 929	292 280	930 209
2016	66 126	355 883	2 877	176 302	109 971	937 202	153 251	1 801 612	668 368	317 274	985 642
2017	57 622	374 227	2 860	170 817	128 983	1 123 855	180 788	2 039 151	744 605	303 603	1 048 208
2018	71 692	395 453	2 693	160 198	125 808	992 969	180 524	1 929 338	722 891	285 830	1 008 721
2019	73 326	436 950	2 954	153 359	127 674	1 050 326	177 957	2 022 545	766 428	287 609	1 054 038
2012: 02	80 107	233 773	2 446	128 300	67 480	586 834	97 883	1 196 823	501 700	191 530	693 230
03	84 931	249 805	2 527	134 214	66 465	624 481	97 894	1 260 317	513 273	202 743	716 015
04	88 857	260 302	2 476	136 096	66 967	681 690	101 736	1 338 123	554 178	202 706	756 884
2013: 01	87 319	275 205	2 461	141 696	64 803	696 390	120 744	1 388 617	563 253	214 465	777 718
02	87 121	269 697	2 066	141 420	61 028	713 506	113 586	1 388 422	551 626	226 014	777 640
03	84 424	285 586	2 167	137 115	64 607	794 330	115 766	1 483 995	584 705	231 125	815 829
04	74 264	294 691	2 237	136 199	69 596	841 435	124 211	1 542 633	604 311	238 034	842 346
2014: 01	76 275	303 957	2 206	134 884	68 821	873 803	123 057	1 583 002	651 045	219 408	870 453
02	78 593	319 332	2 358	139 620	61 223	921 825	126 119	1 649 071	666 952	233 182	900 134
03	72 326	336 281	2 365	143 242	81 658	906 669	130 378	1 672 918	642 561	248 681	891 242
04	48 249	350 720	2 466	152 391	85 364	920 625	133 137	1 692 952	650 875	255 314	906 189
2015: 01	49 498	356 655	2 496	156 105	88 754	978 657	138 761	1 770 926	659 888	264 686	924 573
02	45 226	365 323	2 317	156 105	93 469	981 576	138 619	1 782 635	639 521	279 649	919 170
03	50 295	363 769	2 270	159 074	95 103	934 414	137 138	1 742 062	633 058	281 188	914 246
04	32 235	349 222	1 949	157 129	104 015	940 750	149 229	1 734 529	637 929	292 280	930 209
2016: 01	31 436	358 077	2 109	165 340	101 667	983 002	154 357	1 795 987	672 657	294 185	966 843
02	32 924	364 831	2 799	174 934	96 833	1 010 849	163 450	1 846 621	677 404	300 714	978 119
03	37 439	360 435	2 913	176 841	108 737	965 266	161 772	1 813 404	674 178	303 652	977 830
04	66 126	355 883	2 877	176 302	109 971	937 202	153 251	1 801 612	668 368	317 274	985 642
2017: 01	82 556	348 629	2 887	172 569	113 463	958 723	164 001	1 842 827	674 860	326 433	1 001 293
02	75 629	354 215	2 916	174 452	124 292	959 169	163 737	1 854 410	700 210	306 993	1 007 203
03	83 757	357 898	2 906	177 163	126 395	1 012 598	167 458	1 928 175	717 144	318 052	1 035 196
04	57 622	374 227	2 860	170 817	128 983	1 123 855	180 788	2 039 151	744 605	303 603	1 048 208
2018: 01	65 563	390 769	2 908	174 045	124 966	1 043 401	174 051	1 975 703	734 138	297 700	1 031 838
02	60 950	387 636	2 730	168 102	125 979	1 066 300	181 982	1 993 678	750 348	300 315	1 050 664
03	74 097	387 673	2 720	159 513	131 766	1 024 620	201 240	1 981 627	740 758	299 188	1 039 946
04	71 692	395 453	2 693	160 198	125 808	992 969	180 524	1 929 338	722 891	285 830	1 008 721
2019: 01	82 963	396 730	2 727	158 963	129 267	1 021 079	191 221	1 982 951	754 414	288 847	1 043 261
02	90 494	414 157	2 773	162 881	127 546	1 064 711	190 256	2 052 817	765 838	282 589	1 048 427
03	94 472	423 874	2 696	155 233	121 269	1 014 516	202 219	2 014 280	757 367	285 726	1 043 094
04	73 326	436 950	2 954	153 359	127 674	1 050 326	177 957	2 022 545	766 428	287 609	1 054 038
2020: 01	84 673	407 721	2 888	142 938	122 451	842 891	208 781	1 812 342

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- Funds administered by the Department of Finance, Transnet, Telkom and the Post Office which are not subject to regulation and supervision in terms of the Pension Funds Act. Deposit administration investments excluded.
- Deposits with the Public Investment Corporation are allocated to the relevant investment items, mainly securities. As from March 2002 data reported at market value.
- Privately administered funds registered in terms of the Pension Funds Act, foreign funds registered in South Africa, funds established in terms of industrial agreements, and state-controlled funds exempted from the requirements of the Act. Underwritten funds covered by insurance policies or group insurance schemes and included with long-term insurers, are excluded.
- Including unamortised discount, fixed property investment, accumulated interest and foreign assets.
- Funds invested with long-term insurers, in terms of deposit administration contracts and insurance policies, are not included in totals of assets and liabilities.
- As from March 1999 data for private self-administered pension and provident funds are reported at market value.

Private self-administered pension and provident funds¹

Assets

R millions

End of	Coin, banknotes and deposits (2350K)	Fixed-interest securities				Ordinary shares ³ (2355K)	Loans			Fixed property (2359K)	Other assets ⁵ (2360K)	Total assets ^{6,7} (2361K)	Funds invested with insurers ⁶ (2362K)
		Government (2351K)	Local governments (2352K)	Public enterprises (2353K)	Other ² (2354K)		Mortgage (2356K)	To public sector ⁴ (2357K)	Other (2358K)				
2011	50 470	107 993	1 961	12 754	70 462	365 888	502	129	3 350	24 751	19 669	657 930	328 122
2012	58 614	128 361	1 747	17 291	91 089	422 040	571	69	3 549	13 632	19 921	756 884	349 227
2013	58 265	140 939	2 887	18 326	111 099	478 593	609	11	1 755	13 730	16 131	842 346	372 299
2014	58 628	163 014	4 967	16 122	119 120	507 413	412	-	1 690	13 701	21 122	906 189	452 135
2015	51 482	168 461	4 581	16 434	139 807	500 381	841	-	1 198	22 075	24 949	930 209	481 454
2016	62 329	197 311	5 893	17 479	129 131	521 114	1 035	-	1 680	17 148	32 523	985 642	474 112
2017	49 504	198 990	5 642	19 009	128 943	585 137	1 328	-	1 335	17 481	40 838	1 048 208	513 623
2018	51 372	194 031	6 814	20 415	128 954	543 594	813	-	1 009	15 238	46 480	1 008 721	512 361
2019	50 645	188 942	11 881	21 954	140 492	568 137	663	-	810	14 318	56 196	1 054 038	580 310
2012: 01	59 861	115 922	1 412	13 713	73 496	376 789	634	127	4 294	16 027	22 040	684 316	339 472
02	61 667	115 054	1 529	13 619	79 791	380 631	597	94	3 894	15 849	20 504	693 230	350 586
03	63 753	119 428	1 764	14 313	83 139	393 774	558	97	3 667	15 805	19 717	716 015	356 373
04	58 614	128 361	1 747	17 291	91 089	422 040	571	69	3 549	13 632	19 921	756 884	349 227
2013: 01	57 175	131 146	2 054	20 397	95 229	432 718	530	69	3 477	15 092	19 830	777 718	346 473
02	55 255	128 791	1 900	18 789	97 527	439 339	591	56	2 091	15 809	17 494	777 640	375 879
03	55 268	134 306	2 309	18 946	103 047	465 052	614	56	1 803	16 090	18 338	815 829	374 143
04	58 265	140 939	2 887	18 326	111 099	478 593	609	11	1 755	13 730	16 131	842 346	372 299
2014: 01	56 369	145 180	3 745	17 797	114 691	498 875	660	11	1 735	13 920	17 470	870 453	371 983
02	63 580	156 305	4 099	16 659	118 021	507 660	392	-	1 721	13 406	18 292	900 134	391 345
03	61 864	162 380	4 670	14 820	118 340	497 466	485	-	1 649	12 874	16 693	891 242	427 333
04	58 628	163 014	4 967	16 122	119 120	507 413	412	-	1 690	13 701	21 122	906 189	452 135
2015: 01	61 371	162 803	4 912	15 936	126 641	516 774	410	-	1 659	13 089	20 978	924 573	481 671
02	58 357	165 269	4 908	16 515	121 201	508 934	420	-	1 632	17 015	24 919	919 170	465 067
03	56 262	169 791	4 670	16 623	127 635	494 334	426	-	1 300	17 218	25 986	914 246	472 737
04	51 482	168 461	4 581	16 434	139 807	500 381	841	-	1 198	22 075	24 949	930 209	481 454
2016: 01	62 187	175 653	4 726	16 690	133 432	525 814	1 169	-	1 244	22 625	23 303	966 843	479 895
02	65 379	186 815	5 528	17 195	136 287	520 568	1 102	-	1 957	19 024	24 265	978 119	460 469
03	63 664	187 128	5 679	17 867	131 415	522 455	1 113	-	1 861	19 586	27 062	977 830	473 074
04	62 329	197 311	5 893	17 479	129 131	521 114	1 035	-	1 680	17 148	32 523	985 642	474 112
2017: 01	51 749	196 552	5 242	18 736	136 159	538 484	1 346	-	1 578	17 508	33 941	1 001 293	476 436
02	48 384	198 378	5 410	18 353	136 558	539 245	1 151	-	1 493	17 288	40 943	1 007 203	483 915
03	48 698	199 984	5 045	18 974	140 323	556 657	1 496	-	1 187	16 982	45 851	1 035 196	507 636
04	49 504	198 990	5 642	19 009	128 943	585 137	1 328	-	1 335	17 481	40 838	1 048 208	513 623
2018: 01	49 696	206 838	7 534	20 782	124 136	559 317	1 269	-	1 227	18 155	42 883	1 031 838	504 667
02	44 792	201 860	7 520	20 941	131 568	576 596	807	-	1 162	17 120	48 299	1 050 664	520 648
03	51 078	189 614	7 968	22 243	136 717	568 050	563	-	1 084	15 860	46 769	1 039 946	511 945
04	51 372	194 031	6 814	20 415	128 954	543 594	813	-	1 009	15 238	46 480	1 008 721	512 361
2019: 01	49 831	197 730	6 764	19 140	139 201	563 520	1 057	-	974	15 224	49 821	1 043 261	532 630
02	52 718	198 199	8 365	20 387	138 254	558 389	741	-	885	15 015	55 474	1 048 427	536 968
03	50 803	194 519	9 187	18 956	141 041	552 102	598	-	859	14 367	60 661	1 043 094	559 590
04	50 645	188 942	11 881	21 954	140 492	568 137	663	-	810	14 318	56 196	1 054 038	580 310

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- Privately administered funds registered in terms of the Pension Funds Act, foreign funds registered in South Africa, funds established in terms of industrial agreements, and state-controlled funds exempted from requirements of the Act. Underwritten funds covered by insurance policies or group insurance schemes and included with long-term insurers, are excluded.
- Company stock, loan securities, preference shares and foreign securities.
- Including units in unit trusts.
- Local governments, public enterprises and, as from September 1979, also universities.
- Including unallocated foreign assets.
- Funds invested with long-term insurers, in terms of deposit administration contracts and insurance policies, are not included in totals of assets and liabilities.
- As from March 1999 data are reported at market value.

Private self-administered pension and provident funds

Income statement¹

R millions

Period	Current receipts					Current expenditure				Domestic current income surplus	Net capital profits and other income	Investment income from insurers	Total net cash inflow	Net asset revaluation ³
	Investment income ²			Contributions by		Benefits			Adminis-trative expenses					
	Interest	Dividends	Rent	Members	Employ-ers	Annuities	Lump sum at retire-ment or death	Other lump sum payments						
(2310K)	(2323K)	(2311K)	(2312K)	(2313K)	(2314K)	(2315K)	(2316K)	(2317K)	(2318K)	(2319K)	(2320K)	(2321K)	(2322K)	
2014	9 704	18 244	2 017	25 479	30 373	19 412	15 841	42 245	2 811	5 508	47 675	13 983	67 166	32 416
2015	11 061	18 305	2 708	28 739	33 860	18 912	22 262	54 705	2 688	-3 895	9 840	15 645	21 590	5 288
2016	11 136	19 332	2 685	32 220	34 842	19 854	23 636	57 143	2 932	-3 351	10 504	8 975	16 129	-3 214
2017	11 656	23 018	2 571	33 568	35 327	23 061	20 909	52 166	3 168	6 836	12 376	7 677	26 889	26 069
2018	11 358	26 643	2 490	35 573	38 284	22 396	23 143	54 117	3 380	11 313	5 431	8 343	25 087	-48 481
2019	11 410	28 367	2 465	37 607	38 400	19 262	25 044	56 516	3 523	13 903	5 574	6 519	25 996	7 669
2018: 01	2 761	6 721	612	9 206	9 113	4 657	5 969	15 082	838	1 869	1 502	2 232	5 603	-13 802
02	3 119	5 954	631	8 409	9 457	5 461	5 633	12 166	812	3 497	1 094	2 194	6 785	5 056
03	2 651	6 635	623	8 914	9 983	5 272	5 686	13 521	840	3 486	1 579	2 127	7 193	-11 585
04	2 826	7 333	624	9 044	9 731	7 006	5 854	13 348	890	2 460	1 256	1 790	5 506	-28 149
2019: 01	2 795	6 213	622	9 800	9 261	4 498	5 815	14 132	827	3 420	2 270	1 451	7 141	13 639
02	3 111	7 280	623	9 280	9 837	5 440	6 151	13 659	929	3 951	1 248	1 709	6 907	-796
03	2 955	7 287	610	9 267	9 620	4 947	6 733	14 660	842	2 557	1 116	1 619	5 292	-8 873
04	2 548	7 587	610	9 261	9 683	4 377	6 345	14 066	925	3 975	940	1 740	6 655	3 699

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Trust companies⁴

Assets and liabilities

R millions

End of	Funds administered ⁵							Own assets ⁷	Funds received from:				Total liabilities = total assets
	Cash and deposits	Fixed-interest securities	Ordinary shares ⁶	Loans	Fixed property	Other assets	Total assets administered		Testamentary trusts	Intervivos trusts	Other	Own funds	
	(2566K)	(2567K)	(2568K)	(2569K)	(2570K)	(2571K)	(2572K)		(2573K)	(2574K)	(2575K)	(2576K)		(2577K)	(2578K)
2014	9 246	3 127	29 988	577	1 864	2 821	47 624	924	-	-	47 624	924	48 548
2015	8 419	3 510	36 035	1 460	3 792	7 094	60 310	896	-	-	60 310	896	61 206
2016	8 397	3 605	38 855	1 467	4 032	7 908	64 265	890	-	-	64 265	890	65 155
2017	5 855	3 379	45 534	1 514	4 675	12 673	73 630	923	-	-	73 630	923	74 553
2018	6 423	3 612	54 224	1 886	4 890	5 376	76 411	947	-	-	76 411	947	77 358
2019	7 232	6 269	66 750	1 942	6 254	7 245	95 691	845	-	-	95 691	845	96 537
2018: 02	6 606	3 478	46 825	1 602	4 762	14 712	77 985	1 020	-	-	77 985	1 020	79 004
03	6 897	3 483	46 338	1 591	4 797	14 830	77 936	1 026	-	-	77 936	1 026	78 962
04	6 423	3 612	54 224	1 886	4 890	5 376	76 411	947	-	-	76 411	947	77 358
2019: 01	7 451	3 556	59 334	2 047	5 066	7 543	84 997	981	-	-	84 997	981	85 978
02	7 302	4 271	61 164	1 937	5 073	7 172	86 920	1 025	-	-	86 920	1 025	87 945
03	6 376	4 047	63 398	1 930	5 221	7 235	88 207	1 013	-	-	88 207	1 013	89 221
04	7 232	6 269	66 750	1 942	6 254	7 245	95 691	845	-	-	95 691	845	96 537
2020: 01	7 674	6 179	59 707	1 951	6 275	7 158	88 944	945	-	-	88 944	945	89 889

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- Source: Registrar of Pension Funds, annual reports up to 1990, thereafter South African Reserve Bank survey.
- Excluding income from policies and funds invested with insurers.
- Including amounts transferred to and from other funds.
- Reporting at market values.
- Assets managed and administered on behalf of trust beneficiaries.
- Including units in unit trusts.
- Funds sourced, managed and administered on behalf of the trust company itself.

Finance companies¹

Liabilities

R millions

End of	Ordinary shares (2621K)	Reserves (2622K)	Fixed-interest securities (2623K)	Loans		Provisions (2626K)	Other liabilities (2627K)	Total liabilities (2628K)
				Banks (2624K)	Other (2625K)			
2013	1 109	31 874	880	37 986	113 296	6 655	8 097	199 897
2014	1 772	28 945	699	53 943	124 470	10 949	8 270	229 048
2015	2 070	30 345	582	67 049	131 961	13 607	9 544	255 157
2016	2 258	34 116	608	79 267	136 246	13 611	10 534	276 640
2017	2 513	35 465	446	91 795	139 884	15 991	9 310	295 405
2018	2 484	40 020	390	96 146	144 442	20 961	10 787	315 229
2019	2 863	34 913	228	92 907	156 398	24 437	10 041	321 786
2018: 01	2 513	33 382	444	92 663	140 842	18 719	11 270	299 832
02	2 549	33 007	444	92 223	143 771	18 917	10 645	301 555
03	2 549	35 467	421	95 654	143 915	19 409	11 332	308 747
04	2 484	40 020	390	96 146	144 442	20 961	10 787	315 229
2019: 01	2 484	39 721	390	93 528	145 091	20 904	11 773	313 891
02	2 791	36 936	251	93 498	147 078	21 302	10 435	312 290
03	2 863	37 676	249	92 685	152 359	24 763	10 718	321 314
04	2 863	34 913	228	92 907	156 398	24 437	10 041	321 786
2020: 01	2 863	34 105	228	92 005	158 685	23 560	9 501	320 946

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Assets

R millions

End of	Cash and deposits (2611K)	Debtors ² (2612K)	Instalment sale finance (2613K)	Leasing finance (2614K)	Loans		Ordinary shares ³ (2617K)	Fixed property (2618K)	Other assets (2619K)	Total assets (2620K)
					Mortgage (2615K)	Other (2616K)				
2013	5 873	4 263	95 125	2 500	28 743	45 711	4 811	2 817	10 055	199 897
2014	6 818	4 409	115 953	2 662	32 394	48 120	4 783	3 063	10 845	229 048
2015	7 552	6 487	127 814	3 047	35 570	49 463	4 728	8 085	12 412	255 157
2016	10 166	5 469	141 406	2 993	38 748	49 972	3 141	9 571	15 173	276 640
2017	12 197	5 804	155 731	3 970	40 881	48 195	3 442	9 619	15 566	295 405
2018	13 197	6 388	162 574	8 997	43 926	46 591	8 677	7 961	16 918	315 229
2019	15 249	4 787	166 233	8 486	43 356	51 101	4 828	7 866	19 880	321 786
2018: 01	12 087	5 617	157 241	4 409	42 126	49 094	3 923	9 406	15 929	299 832
02	10 793	5 993	158 355	4 149	43 346	49 583	4 367	8 860	16 109	301 555
03	11 208	6 363	158 611	8 734	43 278	48 169	6 642	8 543	17 199	308 747
04	13 197	6 388	162 574	8 997	43 926	46 591	8 677	7 961	16 918	315 229
2019: 01	11 592	7 020	162 226	8 721	44 339	46 444	8 537	7 783	17 229	313 891
02	11 435	5 528	163 522	8 651	44 581	47 953	8 312	7 203	15 104	312 290
03	12 215	5 028	165 691	8 391	43 294	50 621	8 298	7 262	20 514	321 314
04	15 249	4 787	166 233	8 486	43 356	51 101	4 828	7 866	19 880	321 786
2020: 01	14 487	5 001	165 426	8 273	43 636	52 563	3 365	7 884	20 310	320 946

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1. Reporting at market values.
2. Including factored debtors.
3. Including units in unit trusts.

Non-bank financial institutions¹

Liabilities

R millions

End of	Funds received (2645K)	Shares and equity (2646K)	Fixed-interest securities (2647K)	Loans (2648K)	Technical reserves		Financial derivatives (2651K)	Other liabilities (2652K)	Total liabilities (2653K)
					Pension (2649K)	Other (2650K)			
2013	154 898	2 264 542	30 153	306 166	2 799 164	1 196 280	10 561	154 529	6 916 293
2014	181 106	2 412 270	37 299	351 743	3 087 849	1 380 131	12 253	141 663	7 604 314
2015	198 121	2 725 578	50 416	397 467	3 140 556	1 485 862	25 755	146 764	8 170 519
2016	222 511	2 970 965	63 404	404 092	3 275 177	1 519 771	18 811	122 966	8 597 697
2017	247 732	3 214 089	65 625	424 025	3 672 613	1 643 516	17 820	119 331	9 404 751
2018	260 152	3 219 919	52 852	452 652	3 533 417	1 649 379	22 117	112 801	9 303 289
2019	280 480	3 472 667	75 174	464 099	3 708 641	1 827 689	20 143	128 500	9 977 393
2018: 01	253 763	3 151 457	64 032	431 939	3 585 652	1 619 417	19 986	114 195	9 240 441
02	256 298	3 228 612	62 345	442 030	3 643 138	1 677 721	22 672	120 609	9 453 425
03	259 638	3 323 573	52 538	456 670	3 651 125	1 686 317	23 079	121 752	9 574 692
04	260 152	3 219 919	52 852	452 652	3 533 417	1 649 379	22 117	112 801	9 303 289
2019: 01	266 200	3 386 526	53 799	461 965	3 659 013	1 724 542	21 511	116 268	9 689 824
02	280 038	3 400 702	62 599	470 053	3 754 207	1 741 041	20 892	115 438	9 844 970
03	278 422	3 438 482	81 112	462 273	3 684 180	1 786 828	21 293	134 660	9 887 250
04	280 480	3 472 667	75 174	464 099	3 708 641	1 827 689	20 143	128 500	9 977 393

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Assets

R millions

End of	Cash and deposits (2630K)	Fixed-interest securities (2631K)	Shares and other equity (2632K)	Loans (2633K)	Financial derivatives (2634K)	Non-financial assets (2635K)	Other assets (2636K)	Total assets (2637K)
2013	458 697	1 946 220	3 876 669	412 781	10 532	108 080	103 314	6 916 293
2014	456 009	2 190 600	4 335 023	402 406	10 719	111 453	98 104	7 604 314
2015	531 226	2 331 965	4 651 585	392 926	13 166	141 385	108 266	8 170 519
2016	531 341	2 546 695	4 805 003	443 461	14 435	134 379	122 383	8 597 697
2017	528 852	2 751 185	5 373 985	459 113	15 246	140 559	135 811	9 404 751
2018	556 411	2 848 823	5 113 062	468 257	12 872	144 892	158 972	9 303 289
2019	586 020	3 105 531	5 470 678	478 677	13 513	134 241	188 733	9 977 393
2018: 01	519 319	2 821 736	5 140 225	462 432	16 468	143 560	136 701	9 240 441
02	491 506	2 833 134	5 361 366	464 446	15 460	143 911	143 602	9 453 425
03	554 238	2 885 057	5 357 461	466 040	12 615	143 343	155 938	9 574 692
04	556 411	2 848 823	5 113 062	468 257	12 872	144 892	158 972	9 303 289
2019: 01	567 836	2 951 839	5 384 567	468 315	15 218	146 965	155 084	9 689 824
02	580 581	3 036 728	5 409 855	469 295	12 555	148 873	187 083	9 844 970
03	594 380	3 106 884	5 375 833	475 062	12 415	132 162	190 514	9 887 250
04	586 020	3 105 531	5 470 678	478 677	13 513	134 241	188 733	9 977 393

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1. Consisting of unit trusts, the Public Investment Corporation, long and short-term insurers, official and private pension funds, participation bond schemes, finance companies and non-monetary public financial corporations. Reporting at market values.

National financial account

Flow of funds for the year 2019¹

R millions

Sectors Transaction items	Financial intermediaries											
	Foreign sector		Monetary authority		Other monetary institutions ²		Public Investment Corporation ³		Insurers and retirement funds		Other financial institutions	
	S	U	S	U	S	U	S	U	S	U	S	U
1. Net saving ⁴	153 177		5 386		29 555		272		25 335		45 969	
2. Consumption of fixed capital ⁴			640		17 545		32		768		4 767	
3. Capital transfers	168	412										
4. Gross capital formation ⁴				653		36 341		35		577		4 330
5. Net lending (+)/net borrowing (-) (S)	152 933		5 373		10 759		269		25 526		46 406	
6. Net financial investment (+) or (-) (U)		152 933		5 373		10 759		269		25 526		46 406
7. Net incurrence of financial liabilities (Total S 9 – 32)	-122 580		36 289		356 972		117 765		273 243		158 574	
8. Net acquisition of financial assets (Total U 9 – 32)		30 353		41 662		367 731		118 034		298 769		204 980
9. Gold and other foreign reserves	25 370			25 370								
10. Cash and demand monetary deposits ⁵		-5 045	39 151	23 500	67 776	12 349		-42		-1 688		-7 766
11. Short/Medium-term monetary deposits ⁵		10 207		2 000	96 247			4 345		-486		-16 306
12. Long-term monetary deposits ⁵		11 587			90 135			2 059		13 139		43 488
13. Funds placed with other financial institutions	1 359	337				11 238		12 894		5 409	138 011	1 359
14. Funds placed with other institutions	-69 083					-62 486	117 765	2 931	2 931	88 286		2 142
15. Treasury bills	-831			-338		7 470		4 546		-1 073		735
16. Other bills	1 924			4 688	-1 380	2 021		14 982		-190		36 454
17. Bank loans and advances	20 402		-9	5 742	5 713	121 932			-77		18 358	
18. Trade credit and short-term loans	24 092	11 750	-1 619	-14 482	-30 015	10 032			24 053	48 150	-3 535	18 730
19. Short-term government bonds				156		13 639		19 430		-8 606		9 781
20. Long-term government bonds		141 644				64 893		42 615		48 179		49 471
21. Non-marketable debt of central government ⁶ ..		-788										
22. Securities of local governments						-930		24		5 603		-77
23. Securities of public enterprises	1 508	5 960		-65		13 233		-7 649		-24	846	-406
24. Other loan stock and preference shares	37 145	-1 339			-3 971	58 462		-11 006	3 699	33 799	8 067	30 423
25. Ordinary shares	-15 769	-41 413			6 888	17 859		47 987	406	112 659		23 159
26. Foreign branch/head office balances												
27. Long-term loans	26 468	15 624	-958	-3	4 259				196	86	5 825	4 864
28. Mortgage loans	-1 347					109 407				228	728	-47
29. Interest in retirement and life funds ⁷		13 064				412			176 915			
30. Financial derivatives	-159 054	-163 231			30 802	58 065			-1 270	2 505	3 479	4 069
31. Amounts receivable/payable	556	10	224	381		-20 653			36 340	-12 107	-2 155	6 709
32. Other liabilities/assets	-15 320	31 986	-500	-5 287	90 388	-48 659		-15 082	29 538	-34 825	-10 789	-2 351
33. Balancing item					130	-553			512	-275	-261	549

S = Sources, i.e. net increase in liabilities at transaction value.

U = Uses, i.e. net increase in assets at transaction value.

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1. A negative amount reflects a decrease in that item. In the case of liabilities (sources) it denotes a reduction in the available sources of funds and in the case of assets (uses) it indicates an additional source of funds.

2. Including mutual banks and the Postbank.

3. Before April 2005 the Public Investment Commissioners.

4. As taken from the national income (and production) accounts.

5. Namely deposits with the South African Reserve Bank (including coin liabilities), Corporation for Public Deposits, banks, the Land Bank, mutual banks and the Postbank.

6. Non-marketable bonds and other Treasury bills.

7. Members' interest in the reserves of retirement and all insurance funds.

National financial account (continued)

Flow of funds for the year 2019¹

R millions

General government				Corporate business enterprises				Households, etc.		Total		Sectors	
Central and provincial governments		Local governments		Public sector		Private sector							
S	U	S	U	S	U	S	U	S	U	S	U	Transaction items	
-65 642		-44 380		-56 812		94 849		-7 682		180 027			1. Net saving ⁴
71 569		26 493		110 445		407 442		73 377		713 078			2. Consumption of fixed capital ⁴
	138 995	40 188		75 728		2 039	60	21 452	108	139 575	139 575		3. Capital transfers
	70 302	66 891		135 228		481 500		97 248		893 105			4. Gross capital formation ⁴
-203 370		-44 590		-5 867		22 770		-10 209		-			5. Net lending (+)/net borrowing (-) (S)
	-203 370	-44 590		-5 867		22 770		-10 209					6. Net financial investment (+) or (-) (U)
346 320		38 566		11 375		370 532		238 459		1 825 515			7. Net incurrence of financial liabilities (Total S 9 – 32)
	142 950	-6 024		5 508		393 302		228 250		1 825 515			8. Net acquisition of financial assets (Total U 9 – 32)
	24 246	-5 026		-579		41 169		25 809		25 370	25 370		9. Gold and other foreign reserves
	1 567	1 039		9 731		8 923		75 227		106 927	106 927		10. Cash and demand monetary deposits ⁵
	-3 049	-662		4 587		15 690		3 296		96 247	96 247		11. Short/Medium-term monetary deposits ⁵
		-1 379		33		74 130		35 349		90 135	90 135		12. Long-term monetary deposits ⁵
	20 733					920		927		139 370	139 370		13. Funds placed with other financial institutions
44 160										52 533	52 533		14. Funds placed with other institutions
	93									43 329	43 329		15. Treasury bills
				-423		51 172				51 293	51 293		16. Other bills
-4 590		3 402		1 839		27 124		55 512		127 674	127 674		17. Bank loans and advances
-46 458	17 749	-15	2	-3 752	-478	9 768	-58 188	50 865	-9 881	23 384	23 384		18. Trade credit and short-term loans
34 400										34 400	34 400		19. Short-term government bonds
346 938					136					346 938	346 938		20. Long-term government bonds
-545									243	-545	-545		21. Non-marketable debt of central government ⁶
		-384					-5 004			-384	-384		22. Securities of local governments
	3 624			10 759			-1 627		67	13 113	13 113		23. Securities of public enterprises
	8 613			10 744	-1	97 063	33 796			152 747	152 747		24. Other loan stock and preference shares
	5 291			8 120	-264	98 965	-66 668			98 610	98 610		25. Ordinary shares
													26. Foreign branch/head office balances
-1 299	36 157	195	2	17 937	2 637	18 231	18 735	7 094	-154	77 948	77 948		27. Long-term loans
				-503		61 071		49 639		109 588	109 588		28. Mortgage loans
							12 328		151 111	176 915	176 915		29. Interest in retirement and life funds ⁷
				-268	1 223	196 980	168 038			70 669	70 669		30. Financial derivatives
-26 286	27 926			-25 618	8 001	-46 014	16 339	55 116	-34 443	-7 837	-7 837		31. Amounts receivable/payable
		34 928		-7 096	-19 432	-144 383	109 950	20 233	-19 301	-3 001	-3 001		32. Other liabilities/assets
		440		-364	-86	-365	457			92	92		33. Balancing item

S = Sources, i.e. net increase in liabilities at transaction value.

U = Uses, i.e. net increase in assets at transaction value.

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1. A negative amount reflects a decrease in that item. In the case of liabilities (sources) it denotes a reduction in the available sources of funds and in the case of assets (uses) it indicates an additional source of funds.
2. Including mutual banks and the Postbank.
3. Before April 2005 the Public Investment Commissioners.
4. As taken from the national income (and production) accounts.
5. Namely deposits with the South African Reserve Bank (including coin liabilities), Corporation for Public Deposits, banks, the Land Bank, mutual banks and the Postbank.
6. Non-marketable bonds and other Treasury bills.
7. Members' interest in the reserves of retirement and all insurance funds.

Capital market

Selected data

Period	Percentage change ^{1,2}									
	Real estate	Total value of shares traded ³	Total nominal value of bonds traded ³	Total value of derivatives contracts traded ^{3,5}	Share prices					Total value of share capital raised ³
	Transfer duty ⁴				Gold mining	Resources	Financial	Industrial	All shares	
	(2072A)	(2039A)	(2042A)	(2047A)	(2073A)	(2074A)	(2075A)	(2076A)	(2077A)	(2048A)
2012	9.0	6.7	0.0	26.3	-27.1	-3.9	31.0	36.6	19.2	-1.5
2013	42.5	1.4	-2.3	8.8	-54.5	-3.8	11.4	26.5	13.1	116.2
2014	19.3	45.0	8.0	26.5	2.2	-10.4	25.6	16.4	9.7	-71.9
2015	5.5	35.7	57.6	16.9	-5.9	-41.1	0.5	13.7	-4.2	738.7
2016	4.6	-21.6	-38.1	-8.1	27.0	66.9	1.8	-17.2	-2.8	-85.2
2017	0.3	56.3	44.5	10.1	-7.5	16.8	9.3	10.3	11.5	9.7
2018	-16.3	-43.9	16.4	-22.2	-3.0	-1.0	-11.0	-24.0	-15.7	-82.9
2019	0.0	20.5	2.9	13.7	106.5	16.2	-1.2	-25.9	-10.1	92.6
2017: May	-2.1	-14.6	-6.4	-11.9	-35.5	16.2	1.8	-7.2	-1.5	-76.9
Jun	3.6	-5.3	-14.1	-14.5	-44.4	11.2	-1.5	-10.3	-5.0	62.3
Jul	-8.9	-16.6	-4.9	-7.0	-56.7	14.8	1.5	-6.1	-0.7	-59.5
Aug	-0.3	-11.1	-5.0	3.0	-51.6	21.7	2.4	-0.9	4.2	153.0
Sep	-18.7	-18.5	9.5	-2.7	-41.6	25.3	2.7	-1.2	4.7	-87.1
Oct	-6.3	6.7	47.4	-2.8	-31.8	27.0	5.5	4.8	9.4	-21.4
Nov	-8.9	6.2	13.8	5.4	-16.9	24.5	5.5	17.0	16.1	-42.9
Dec	0.3	56.3	44.5	10.1	-7.5	16.8	9.3	10.3	11.5	9.7
2018: Jan	-8.0	31.1	26.5	10.5	-16.8	18.7	10.0	7.5	10.6	518.4
Feb	0.9	36.2	26.5	29.6	-28.9	11.2	9.8	0.6	5.1	-32.8
Mar	-11.9	9.3	-13.9	8.4	-21.7	14.0	11.1	2.4	6.9	-80.6
Apr	2.7	6.6	17.3	1.0	-33.7	10.1	12.3	-4.7	2.3	-50.1
May	-6.2	8.5	0.6	-6.5	-30.3	24.2	6.9	-10.2	0.7	190.4
Jun	-15.1	-6.3	16.4	4.6	-21.6	38.3	6.6	-4.6	6.6	-75.5
Jul	1.1	1.5	22.6	-5.3	-18.8	18.8	4.3	-5.2	2.1	80.9
Aug	-4.6	0.9	14.0	-4.9	-29.0	12.7	1.9	-8.1	-1.3	-93.3
Sep	-1.2	-1.9	-0.2	3.1	-26.9	13.9	3.2	-12.2	-3.0	377.1
Oct	-4.2	3.1	4.5	11.9	-15.0	5.9	-4.1	-24.8	-13.5	-74.8
Nov	2.4	-8.6	6.7	-15.1	-23.9	-4.6	-1.4	-28.1	-17.2	-59.6
Dec	-16.3	-43.9	16.4	-22.2	-3.0	-1.0	-11.0	-24.0	-15.7	-82.9
2019: Jan	-10.9	-27.6	7.5	-17.9	4.1	-4.7	-9.7	-22.7	-15.3	-88.5
Feb	-8.4	-29.4	8.5	-15.1	33.8	10.8	-7.7	-16.0	-7.6	7.9
Mar	-15.1	-12.8	23.4	-2.8	42.0	20.8	-11.4	-34.4	-16.3	354.2
Apr	2.7	-9.2	39.1	7.2	34.5	21.7	-6.5	-28.7	-11.3	-39.3
May	-0.7	-7.0	28.1	28.4	35.6	4.9	-5.7	-29.3	-14.9	6.6
Jun	-16.0	-14.0	27.9	23.8	76.4	4.8	-1.7	-28.1	-13.3	-60.1
Jul	8.5	6.2	48.1	28.2	93.8	7.9	-5.2	-27.9	-13.3	-96.9
Aug	-4.3	0.5	12.3	8.5	142.6	-2.2	-14.8	-27.1	-16.9	330.4
Sep	2.5	7.1	22.6	12.9	121.6	-4.3	-9.3	-28.5	-17.2	-88.2
Oct	13.4	-0.1	0.5	52.8	111.3	-1.7	-1.9	-26.3	-14.2	-61.2
Nov	-9.7	-4.0	9.6	-0.8	117.3	11.4	-2.9	-26.5	-11.8	-49.2
Dec	-0.0	20.5	2.9	13.7	106.5	16.2	-1.2	-25.9	-10.1	92.6
2020: Jan	-7.5	-1.4	20.8	0.9	107.2	13.6	-7.7	-24.7	-11.2	243.1
Feb	0.5	16.0	7.1	17.5	90.4	0.0	-12.7	-27.0	-16.6	334.8
Mar	-7.0	65.5	41.0	11.4	77.7	-31.5	-31.7	-24.8	-28.3	-82.6
Apr	-87.5	26.3	-14.2	4.2	145.8	-22.8	-37.2	-17.8	-23.2	-96.6
May	-44.6	2.7	-21.3	-24.0	204.5	-6.9	-37.7	-11.4	-15.7	-76.1
Jun	-12.1	33.5	-18.9	-26.3	119.5	-1.0	-34.0	-10.2	-12.8	628.4

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1. Measured over a 12-month period.
2. Annual figures reflect the values as at December.
3. Source: The JSE Limited.
4. As from 1 March 2020 the threshold for transfer duty exemption changed.
5. Including futures and options contracts on equity, commodity, warrants, interest rate and currency products.