

WEEKLY MARKET recap

13 – 17 April 2026

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Highlights of the week

- Australia has signed a deal with Brunei to secure fertiliser supply in exchange for Australian food and agricultural products.
- The Australian unemployment rate remained flat at 4.3% in March.

Market Action

Sector	Returns % (excluding distributions)		
	17-Apr-26	10-Apr-26	Change (%)
S&P/ASX 200	8939.6	8954.1	-0.2%
All Ordinaries	9161.2	9149.3	0.1%
Small Ordinaries	3531.8	3476.3	1.6%
S&P 500 *	7041.3	6824.7	3.2%
NASDAQ *	24102.7	22822.4	5.6%
FTSE 100 *	10590.0	10603.5	-0.1%
Hang Seng *	26394.3	25752.4	2.5%
Nikkei *	59518.3	56570.6	5.2%

*US, UK, and Asian prices refer to the previous day's close.

US equity markets rallied on increasing optimism that the Middle East conflict was moving towards a resolution. The S&P 500 and the NASDAQ rose 3.2% and 5.6% respectively to new record highs as first quarter earnings reporting season began. Gains were led by the Information Technology and Consumer Discretionary sectors. The FTSE 100 was flat despite strong economic growth data.

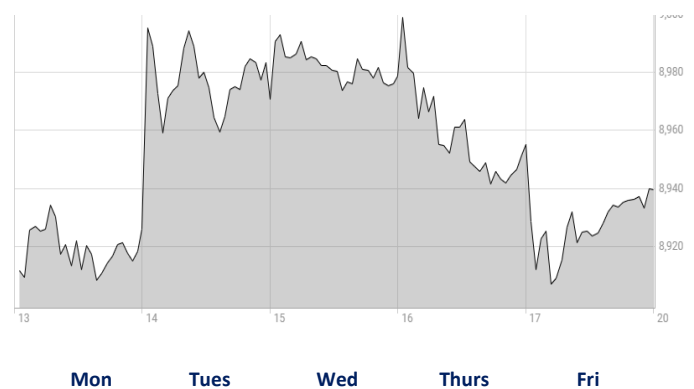
S&P/ASX 200 - Top five of the week

ASX Code	Company	Closing Price	Change*
ZIP	Zip Co	\$2.35	31.6%
SRL	Sunrise Energy Metals	\$12.66	29.8%
MP1	Megaport	\$8.37	22.5%
WTC	Wisetech Global	\$45.99	19.1%
PNI	Pinnacle Investment	\$17.04	19.1%

*Prices as at 3.00PM on 17/04/2026

Zip Co jumped on its third quarter update and upgraded guidance, reporting significant operating margin expansion and record cash earnings before tax, depreciation, and amortisation of \$65.1 million, a 41.5% increase on the prior corresponding period. Sunrise Energy Metals tracked nickel prices higher after supply strains in Indonesia. Scandium prices have also been elevated this year of which Sunrise Energy Metals owns the world's largest and highest-grade deposits. Technology shares rallied on improving investor sentiment with both Megaport and Wisetech Global advancing.

S&P/ASX 200 Index - 1 Week Performance



The Hang Seng index gained 2.5% on strong GDP and retail sales data whilst the Nikkei climbed 5.2% to a new record high whilst Japan's 20-year bond auction saw its highest demand in over six years. The S&P/ASX 200 gave up 0.2% this week, dragged down by the Financials sector. Small companies outperformed both mid and large sized companies, rising by 1.6%.

S&P/ASX 200 - Bottom five of the week

ASX Code	Company	Closing Price	Change*
DTR	Dateline Resources	\$0.33	-25.3%
A2M	The a2 Milk Company	\$7.50	-18.6%
REH	Reece	\$12.72	-12.9%
SMR	Stanmore Resources	\$2.32	-12.3%
DOW	Downer EDI	\$7.37	-9.9%

Dateline Resources dropped on media reports of legal proceedings in the US relating to mining rights at its Colosseum Gold and Rare Earths Project. The a2 Milk Company retreated on guidance downgrades due to supply chain issues for its Chinese label infant milk formula. Strong demand for its product boosted by competitor recalls, freight route availability, operational issues at its Synlait plant and additional customs clearance have all contributed to supply shortfalls. Stanmore Resources pulled back after the ceasefire eroded risk premiums whilst Reece fell on broker downgrades.

Upcoming Dividend Dates

ASX Code	Company	Estimated Dividend Ex-date	Dividend Per Share (\$)	Franking (%)
SOL	Washington H. Soul Pattinson and Co. Limited	20/04/2026	\$0.48	100%

Key Rates Table

Aus. 10-yr Bond Yield	US 10-yr Bond Yield	AUD/USD	AUD/GBP	AUD/EUR	AUD/CNY	AUD/JPY
5.00%	4.32%	0.72	0.53	0.61	4.89	114.37

*Rates as at 3.00PM on 17/04/2026

Topic of the week

Australia's fuel supply has come under further pressure after a fire broke out at Corio oil refinery in Geelong. Owned and operated by Viva Energy, the facility is one of only two oil refineries in Australia. The refinery can produce up to 120,000 barrels of oil per day and is responsible for approximately 50% of fuel in Victoria and 10% of national fuel supply. Its other products include petrol, diesel, jet fuel, marine fuel oil, low aromatic fuel and more.

The fire was attributed to a leak caused by a mechanical failure in equipment and took thirteen hours to contain and extinguish. The

damaged area is a part of liquified petroleum gas (LPG) and low aromatic gasoline production.

Prime Minister Anthony Albanese returned early from his trip to our neighbouring Asian countries to visit the facility. The PM announced that production at the refinery is expected to continue at 80% capacity for jet fuel and diesel and 60% for petrol and that this event would not push Australia into the third stage of the National Fuel Security Plan.

Home Loan Rates

Lender	Owner Occupier (Variable)	Owner Occupier (2 Year Fixed)	Owner Occupier (5 Year Fixed)	Investor (Variable)	Investor (2 Year Fixed)	Investor (5 Year Fixed)
CBA	6.14%	6.49%	6.94%	6.34%	6.54%	7.14%
NAB	6.19%	6.39%	6.49%	6.71%	6.44%	6.59%
Macquarie	5.84%	6.54%	6.74%	5.94%	6.69%	6.89%

*Based on a 25-year, \$450,000 loan with principal and interest repayments and a Loan to-Value ratio of 70%

What to expect for the week ahead

- The US 1st Quarter Corporate Earnings Season has begun with Boeing, American Express, Blackstone, Intel, and Porcter & Gamble all expected to report next week.
- The Australian Bureau of Statistics (ABS) will release the Government Taxation Revenue data for the 2025 Financial Year.



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