



01 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,840	0.4 %	1.5 %
BSE SENSEX	39,395	(0.5) %	1.9 %
CNX BANK	31,271	0.5 %	3.1 %
CNX MIDCAP	17,707	0.3 %	(3.4) %
CNX SMALLCAP	6,228	0.5 %	(7.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,600	0.3 %	14.0 %
S&P 500	2,942	0.6 %	17.3 %
FTSE 100	7,426	0.3 %	10.3 %
HANG SENG	28,543	(0.3) %	13.6 %
NIKKEI	21,276	(0.3) %	8.8 %
SHANGHAI COMPOSITE	2,979	(0.6) %	20.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.08	(0.3) %	(0.5) %
EUR/USD	1.14	0.0 %	(0.7) %
GBP/USD	1.27	0.0 %	(0.5) %
USD/JPY	107.89	0.3 %	(1.6) %
USD/AUD	1.43	(0.3) %	0.6 %
USD/SGD	1.35	(0.0) %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(1.6) %	25.6 %
Gold(INR/10g)	34,006	0.5 %	7.8 %
Gold Comex(USD/oz)	1,413	0.0 %	9.5 %
SILVER(INR/1Kg)	37,425	(0.3) %	(2.2) %
Aluminium(USD/MT)	1,774	(0.5) %	(4.5) %
Copper(USD/MT)	5,972	0.3 %	2.3 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	0.0 %	(0.6) %

Global Economy: The United States and China have shown willingness to restart trade talks after President Donald Trump offered concessions including no new tariffs and an easing of restrictions on tech company Huawei at the G20 meet. China also agreed to make unspecified new purchases of US farm products and decided to return to start further trade negotiations. The University of Michigan on Friday showed US consumer sentiment deteriorated by slightly less than initially estimated in the month of June. The report said the consumer sentiment index for June was upwardly revised to 98.2 from 97.9, although it remains below the final May reading of 100.0. MNI Indicators said its Chicago business barometer fell to 49.7 in June after rising to 54.2 in May, with a reading below 50 indicating a contraction in regional business activity. Eurozone consumer prices increased at a steady pace in June, while core inflation bounced back, flash data from Eurostat showed Friday. Inflation came in at 1.2%, the same rate as seen in May. Japan's housing starts declined for the second month in May. Housing starts dropped by 8.7% year-on-year in May, following a 5.7 percent decline in April.

Global Equities: Asian stocks are up on the trade truce between the US and China. Commodities also edged up.

Indian Economy: A week ahead of the Union Budget, apex industry body ASSOCHAM impressed upon the government, RBI and the banks to ensure adequate liquidity into NBFCs, provide investment incentives and cut corporate tax rates for revival in the economic growth and creation of new entrepreneurial opportunities. Reserve Bank of India has communicated that the applicable average base rate to be charged by Non-Banking Financial Company - Micro Finance Institutions (NBFC-MFIs) to their borrowers for the quarter beginning 1 July 2019 will be 9.18%. The RBI had set applicable average base rate at 9.21% for Q1 of FY2020. India's financial system remains stable in the backdrop of improving resilience of the banking sector, even though the emerging trends in global economic as also geopolitical environment pose challenges, according to RBI's 19th issue of the Financial Stability Report (FSR).

Equity Markets: Key equity benchmarks ended lower on Friday, with the Nifty sliding below 11,800-mark. Negative Asian stocks put pressure on domestic bourses. Investors continued to be cautious ahead of the G-20 summit. The key barometer, the S&P BSE Sensex, fell 191.77 points or 0.48% to 39,394.64. The Nifty 50 index fell 52.70 points or 0.45% to 11,788.85.

Corporate News: Kalpataru Power Transmission has secured new orders / notification of award of about Rs 975 crore. Avenue Supermarts has issued commercial paper of Rs 100 crore on 28 June 2019. SJVN has signed a Memorandum of Understanding (MoU) with NEEPCO (North Eastern Electric Power Corporation) for joint development of power projects in India and abroad with an immediate focus on north-east and the eastern region of the country. Syndicate Bank's board of directors approved to raise capital for an aggregate amount not exceeding Rs 500 crore during FY 2019-20 by way of qualified institutional placement (QIP) / follow on public issue / preferential allotment or any other mode. NMDC said that prices of iron ore with effect from 29 June 2019 has been fixed as Lump Ore (65.5%, 6-40mm) at Rs 3100 per tone and Fines (64%, - 10mm) at Rs 2860 per tone.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	6.6	12.9	77.6
MF(INR cr)	51.7	350.5	116.5

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,865	32,473	34,437
F&O(INR cr)	617,278	1,359,153	1,232,094

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.1	15.8	15.2
NSE VIX	15.0	14.8	19.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	31,105	(0.5) %	2.6 %	Energy	16,047	(0.6) %	(2.9) %
IT	15,936	(0.3) %	0.6 %	Pharma	8,065	(0.3) %	(14.0) %
Metals	2,980	(1.1) %	(3.9) %	Finance	13,556	(0.3) %	8.5 %
Auto	7,928	(0.5) %	(5.8) %	PSU	3,206	0.7 %	(5.3) %
FMCG	29,546	0.2 %	(2.1) %	Real Estate	285	0.5 %	6.6 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
General In	218	5.5 %	(11.3) %	Yes Bank	109	(3.2) %	(60.6) %
ICICI Pru	389	4.1 %	7.2 %	Indiabulls	608	(3.1) %	(28.3) %
HDFC Life	464	2.0 %	20.9 %	Bharti Inf	267	(2.8) %	(15.0) %
GAIL (Indi	312	1.7 %	(12.1) %	S A I L	51	(2.8) %	(7.8) %
Cadila Hea	242	1.6 %	(29.8) %	IndusInd B	1,411	(2.7) %	(19.1) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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