



01 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,357	0.0 %	11.2 %
BSE SENSEX	37,607	0.3 %	13.1 %
CNX BANK	27,764	0.0 %	14.1 %
CNX MIDCAP	18,877	0.0 %	(1.2) %
CNX SMALLCAP	7,466	0.0 %	(5.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,415	0.4 %	2.4 %
S&P 500	2,816	0.5 %	4.5 %
FTSE 100	7,749	0.6 %	1.3 %
HANG SENG	28,583	(0.5) %	(6.3) %
NIKKEI	22,554	0.0 %	(4.1) %
SHANGHAI COMPOSITE	2,876	0.3 %	(14.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.55	(0.2) %	7.7 %
EUR/USD	1.17	0.2 %	(2.7) %
GBP/USD	1.31	0.1 %	(3.0) %
USD/JPY	111.88	0.7 %	(0.8) %
USD/AUD	1.35	(0.2) %	5.5 %
USD/SGD	1.36	(0.0) %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	2.1 %	16.2 %
Gold(INR/10g)	29,660	(0.4) %	1.0 %
Gold Comex(USD/oz)	1,230	(0.2) %	(6.0) %
SILVER(INR/1Kg)	37,792	(0.5) %	(2.1) %
Aluminium(USD/MT)	2,054	(0.0) %	(9.0) %
Copper(USD/MT)	6,185	(1.1) %	(13.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: After reporting a deterioration in US consumer confidence in the previous month, the Conference Board released a report on Tuesday showing a modest rebound in consumer confidence in the month of July. The Conference Board said its consumer confidence index edged up to 127.4. Chinese factory activity moderated. The official manufacturing Purchasing Managers' Index (PMI) fell more sharply than expected in July, although overall manufacturing activity expanded slightly. The PMI dropped from 51.5 to 51.2, with a reading of 50 separating expansion from contraction. Readings of both output and new orders both fell, pointing to a slowing domestic demand. Bank Of Japan (BOJ) kept its monetary policy steady and said that it would make its policy framework more flexible for the long-term yield target. The BOJ maintained its target for the 10-year government bond yield at around zero percent and the short-term interest rate target at minus 0.1%.

Global Equities: Markets eyed the central banking action and a modest correction in commodities weighed on the sentiments.

Indian Economy: India's April-June fiscal deficit was reported at Rs 4.29 lakh crore, or 68.7% of the full-year Budget Estimate (BE) of Rs 6.24 lakh crore, Finance Ministry data showed. The deficit was at 80.8% of BE in the April-June quarter of last fiscal. April-June revenue deficit came in at Rs 3.52 lakh crore or 85% of full year estimate of Rs 4.17 lakh crore. Net tax receipts in the first quarter of 2018-19 fiscal year that ends in March 2019 were Rs. 2.37 lakh crore, government data showed.

Equity Markets: Domestic stocks extended their recent record-setting spree on buying demand in index pivotals. The barometer index, the S&P BSE Sensex, rose 112.18 points or 0.30% to settle at 37,606.58. The Nifty 50 index rose 36.95 points or 0.33% to settle at 11,356.50. Both the Sensex and the Nifty hit record high on intraday as well as closing basis. After trading in negative zone for most part of the session, indices spurted in late trade.

Corporate News: State Bank of India has revised interest rates on domestic term deposits (below Rs 1 crore) by 5-10 basis points in four maturity slabs of one year and above with effect from July 30. Global rating agency Standard and Poor's said that the worst may be over for debt-ridden Indian banks and they may see a turnaround in their finances from 2019-20. Another year of high provisioning is likely as public sector banks clean up their balance sheets and provide for losses on their stressed assets. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP). The combined Index of Eight Core Industries stands at 129.8 in June, 2018, which was 6.7% higher as compared to the index of June, 2017. Its cumulative growth during April to June, 2018-19 was 5.2%. Jindal Steel and Power Ltd (JSPL) today bagged 20% of the Rs 2,500 crore global tender by the Indian Railways to supply long rails. State-owned BEML Limited and Heavy Engineering Corporation Limited (HEC) have signed MoU to meet the growing requirements of the mining industry.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(21.0)	3.6	(31.9)
MF(INR cr)	(198.5)	367.5	474.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,884	32,976	33,027
F&O(INR cr)	1,058,745	967,662	870,482

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.3	13.3	14.8
NSE VIX	12.5	12.7	13.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,764	(0.3) %	14.1 %	Energy	15,150	1.6 %	14.0 %
IT	14,588	1.2 %	14.8 %	Pharma	9,179	0.7 %	6.5 %
Metals	3,335	0.4 %	(5.8) %	Finance	11,663	(0.6) %	13.7 %
Auto	10,974	0.4 %	(0.8) %	PSU	3,186	(1.3) %	11.6 %
FMCG	31,007	0.6 %	17.0 %	Real Estate	273	1.7 %	(7.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharat Ele	116	7.9 %	(19.6) %	Interglobe	930	(7.5) %	(30.0) %
Dabur Indi	422	7.1 %	25.5 %	Idea Cellu	55	(6.1) %	(29.5) %
Emami	591	4.7 %	8.3 %	General In	357	(5.3) %	(3.6) %
DLF	196	3.9 %	(2.3) %	Axis Bank	550	(3.4) %	10.3 %
Tech Mahin	681	3.9 %	6.3 %	Indiabulls	1,297	(3.3) %	4.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CoreLogic House Px (MoM) (JUL)	01-08-2018	0:00	AUD	-	(0.003)
Commodity Index AUD (JUL)	01-08-2018	6:30	AUD	-	108.6
RBA Commodity Index SDR (YoY) (JUL)	01-08-2018	6:30	AUD	-	0.066
MLI Leading Indicator (MoM) (JUN)	01-08-2018	12:30	CAD	-	0.002
RBC Canadian Manufacturing PMI (JUL)	01-08-2018	13:30	CAD	-	57.1
Caixin China PMI Mfg (JUL)	01-08-2018	1:45	CNY	-	51
Markit/ADACI Italy Manufacturing PMI (JUL)	01-08-2018	7:45	EUR	-	53.3
Markit France Manufacturing PMI (JUL F)	01-08-2018	7:50	EUR	-	53.1
Markit/BME Germany Manufacturing PMI (JUL F)	01-08-2018	7:55	EUR	-	57.3
Markit Eurozone Manufacturing PMI (JUL F)	01-08-2018	8:00	EUR	-	55.1
Nationwide House PX (MoM) (JUL)	01-08-2018	6:00	GBP	-	0.005
Nationwide House Px n.s.a. (YoY) (JUL)	01-08-2018	6:00	GBP	-	0.02
Markit UK PMI Manufacturing s.a. (JUL)	01-08-2018	8:30	GBP	-	54.4
Nikkei Japan PMI Manufacturing (JUL F)	01-08-2018	0:30	JPY	-	51.6
Foreign Buying Japan Bonds (27 JUL)	01-08-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (27 JUL)	01-08-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (27 JUL)	01-08-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (27 JUL)	01-08-2018	23:50	JPY	-	-
Monetary Base (YoY) (JUL)	01-08-2018	23:50	JPY	-	0.074
Monetary Base End of period (JUL)	01-08-2018	23:50	JPY	-	-
Vehicle Sales (YoY) (JUL)	01-08-2018	5:00	JPY	-	(0.073)
BOJ holds Committee for Appropriate Use of Yen Benchmarks	01-08-2018	7:00	JPY	-	-
Markit Mexico PMI Mfg (JUL)	01-08-2018	14:30	MXN	-	52.1
MBA Mortgage Applications (27 JUL)	01-08-2018	11:00	USD	-	(0.002)
ADP Employment Change (JUL)	01-08-2018	12:15	USD	-	-
Markit US Manufacturing PMI (JUL F)	01-08-2018	13:45	USD	-	55.5
Construction Spending (MoM) (JUN)	01-08-2018	14:00	USD	-	0.004
ISM Employment (JUL)	01-08-2018	14:00	USD	-	56
ISM Manufacturing (JUL)	01-08-2018	14:00	USD	-	(0.002)



ISM New Orders (JUL)	01-08-2018	14:00	USD	-	63.5
ISM Prices Paid (JUL)	01-08-2018	14:00	USD	-	76.8
DOE Cushing OK Crude Inventory (27 JUL)	01-08-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (27 JUL)	01-08-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (27 JUL)	01-08-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (27 JUL)	01-08-2018	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (1 AUG)	01-08-2018	18:00	USD	-	0.0175
FOMC Rate Decision (Upper Bound) (1 AUG)	01-08-2018	18:00	USD	-	0.02

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