



01 Oct.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,931	0.0 %	7.0 %
BSE SENSEX	36,227	(0.3) %	8.8 %
CNX BANK	24,944	(0.7) %	2.5 %
CNX MIDCAP	17,090	(0.4) %	(10.5) %
CNX SMALLCAP	6,127	(0.4) %	(22.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,458	0.1 %	6.6 %
S&P 500	2,914	0.0 %	8.1 %
FTSE 100	7,510	(0.5) %	(1.8) %
HANG SENG	27,789	0.3 %	(8.9) %
NIKKEI	24,120	1.4 %	2.6 %
SHANGHAI COMPOSITE	2,821	1.1 %	(15.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.49	(0.2) %	13.8 %
EUR/USD	1.16	(0.4) %	(3.4) %
GBP/USD	1.30	(0.4) %	(3.6) %
USD/JPY	113.69	0.1 %	0.9 %
USD/AUD	1.38	(0.1) %	8.3 %
USD/SGD	1.37	(0.0) %	2.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	2.3 %	21.3 %
Gold(INR/10g)	30,296	(0.9) %	3.2 %
Gold Comex(USD/oz)	1,196	0.6 %	(8.6) %
SILVER(INR/1Kg)	37,006	(0.8) %	(4.1) %
Aluminium(USD/MT)	2,012	(0.9) %	(10.8) %
Copper(USD/MT)	6,180	(0.7) %	(13.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

**Global Economy:** A report released by the University of Michigan on Friday showed consumer sentiment in the US improved by slightly less than initially estimated in the month of September. The consumer sentiment index for September was downwardly revised to 100.1. However, the final reading for September still shows a notable increase from the final August reading of 96.2. MNI Indicators said its Chicago business barometer fell to 60.4 in September from 63.6 in August, although a reading above 50 still indicates growth. The report said growth in production and new orders remained solid, although the production index dropped to a six-month low and the new orders index slid to a five-month low. Eurozone inflation edged up in September. The flash data from Eurostat showed that inflation rose to 2.1% from 2% in previous month. The European Central Bank targets "below, but close to 2%" inflation. The core inflation slowed to 0.9% from 1% in August though. Industrial production in Japan rose a seasonally adjusted 0.7% on month in August, following the 0.1% fall in July. On a yearly basis, industrial production added 0.6% -down sharply from 2.2% in the previous month.

**Global Equities:** Trade war fears and weak economic data curbed the global risky assets. Chinese foreign minister Wang Yi has stated that the US-China relationship is at critical point after escalating punitive tariffs, according to media reports.

**Indian Economy:** The Reserve Bank of India has today 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 October 01, 2018 will be 9.02%. Till September 26, the cumulative monsoon rainfall was 9.1% below normal with the weekly rainfall 19.7% below normal. On a regional cumulative basis, spatial distribution has been towards normal though large deficits were seen in parts of East and South India. Out of the 36 sub-divisions across India, till date, 25 have received normal rainfall, 10 have received deficient rainfall while one has received excess rainfall.

**Equity Markets:** Local equity markets declined for third day in a row on Friday, weighed by losses in Larsen & Toubro, Yes Bank and Maruti Suzuki India. Gains in HDFC, HDFC Bank and ITC supported the indices at lower levels. The market was volatile since morning as the indices slipped into red soon after opening higher. The indices remained choppy through the day, weighed down by recent selloff in NBFCs. The Nifty ended below 11,000 mark after flirting with that level in intraday trade.

**Corporate News:** The government has announced a 10% hike in price of domestic natural gas to \$3.36 per million British thermal unit (mmBtu) from October 1, according to Oil Ministry's Petroleum Planning and Analysis Cell. The Reserve Bank of India has imposed a penalty of Rs 5 crore on Karur Vysya Bank for non-compliance with its directions on Income Recognition and Asset Classification (IRAC) norms, reporting of frauds, and on the need for discipline at the time of opening of current accounts. The Reserve Bank of India (RBI) has stopped Bandhan Bank from opening branches freely and frozen the compensation to CEO and founder Chandra Shekhar Ghosh at existing levels as penalty for not reducing promoter stake to 40% by August this year. Kalpataru Power Transmission Limited (KPTL) Friday said it has secured new orders worth Rs 1,145 crore. The company got two orders totalling Rs 644 crore for design, supply and construction of 500 kV and 230 kV transmission lines in CIS and Africa region, respectively.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	85.6	(63.5)	(32.0)
MF(INR cr)	(916.8)	465.0	379.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	48,771	41,711	34,935
F&O(INR cr)	714,420	1,323,605	955,273

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.1	12.9	14.1
NSE VIX	17.0	15.0	13.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,120	0.3 %	3.3 %	Energy	15,697	0.0 %	18.1 %
IT	15,838	(1.1) %	24.6 %	Pharma	9,972	(1.2) %	15.7 %
Metals	3,485	(5.0) %	(1.5) %	Finance	10,577	0.5 %	3.1 %
Auto	9,590	(2.3) %	(13.3) %	PSU	2,700	(0.9) %	(5.4) %
FMCG	29,758	0.3 %	12.3 %	Real Estate	220	(4.7) %	(25.9) %

### 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>
L&T Fin.Ho	130	3.4 %	(19.2) %	Yes Bank	184	(9.6) %	(40.0) %
P & G Hygi	9,720	3.4 %	3.5 %	Indiabulls	857	(8.8) %	(31.1) %
Axis Bank	613	2.2 %	22.9 %	S A I L	68	(8.0) %	(6.6) %
Britannia	5,824	2.2 %	14.0 %	SBI Life I	512	(7.3) %	(25.2) %
Oil India	220	2.0 %	(3.3) %	Hindalco I	230	(5.8) %	8.7 %

### EVENTS CALENDAR

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

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