



01 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,474	0.0 %	(1.7) %
BSE SENSEX	38,667	(0.4) %	(0.5) %
CNX BANK	29,103	0.0 %	(4.0) %
CNX MIDCAP	16,026	0.0 %	(12.6) %
CNX SMALLCAP	5,594	0.0 %	(17.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,917	0.4 %	15.4 %
S&P 500	2,977	0.5 %	18.7 %
FTSE 100	7,408	(0.2) %	10.0 %
HANG SENG	26,092	0.5 %	3.8 %
NIKKEI	21,756	(0.6) %	11.2 %
SHANGHAI COMPOSITE	2,905	(0.9) %	17.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.34	(0.5) %	1.3 %
EUR/USD	1.09	(0.0) %	(4.5) %
GBP/USD	1.23	(0.5) %	(3.6) %
USD/JPY	107.99	0.3 %	(1.5) %
USD/AUD	1.48	(0.1) %	4.1 %
USD/SGD	1.38	0.1 %	1.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.4) %	20.1 %
Gold(INR/10g)	37,475	(0.0) %	18.9 %
Gold Comex(USD/oz)	1,503	(0.6) %	16.5 %
SILVER(INR/1Kg)	44,190	(0.9) %	15.5 %
Aluminium(USD/MT)	1,713	(0.6) %	(7.8) %
Copper(USD/MT)	5,714	(0.7) %	(2.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

Global Economy: MNI Indicators said its Chicago business barometer slumped to 47.1 in September after rebounding to 50.4 in August. A reading below 50 indicates a contraction in Chicago-area business activity. China's factory Purchasing Managers' Index rose to 51.4 in September from 50.4 in August, despite ongoing trade disputes with the United States, survey data from IHS Markit showed on Monday. Any score above 50 indicates expansion in the sector. This was the highest score since February 2018. Official data from the National Bureau of Statistics revealed that China's factory sector continued to contract in September. However, the manufacturing PMI climbed to 49.8 from 49.5 a month ago. Germany's retail turnover grew 0.5% on a monthly basis in August, in contrast to 0.8% drop in July, data from Destatis revealed Monday. However, on a yearly basis, retail sales growth eased to 3.2% from 5.2% in July. Germany's unemployment rate remained stable in August, figures from Destatis revealed Monday. The jobless rate came in at seasonally adjusted 3.1% in August, the same rate as seen in July. On an unadjusted basis, the unemployment rate rose slightly to 3.2% from 3.1% a month ago. Japan's industrial production fell 1.2% month-on-month in August. The monthly fall of shipments was 1.4% in August, while inventories remained unchanged and the inventory ratio increased 2.8%. On a yearly basis, industrial production declined 4.7% in August.

Global Equities: US stocks ended on a positive note as some buying emerged following recent losses.

Indian Economy: Sub-Committee of the Financial Stability and Development Council (FSDC) reviewed the major developments in global and domestic economy and financial markets that impinge on the financial stability. The Sub-Committee discussed about measures to promote interest and competition in stressed asset markets, enhancing the scope of Legal Entity Identifier (LEI) to more effectively monitor group exposures, issues relating to credit rating agencies and audit quality. The Sub-Committee also discussed about measures to strengthen the systems against frauds. Government has banned export of onions with immediate effect till further orders for improving domestic availability. Recently, on 13 September 2019, the Minimum Export Price of US\$ 850 F.O.B. per metric ton was imposed on export of onions. Though there was some reduction in export of onions thereafter, yet the exports were still continuing. The ban on export of onions is expected to improve domestic availability and cool prices. India's real GDP growth for the current financial year is likely to be 5.2% as muted business confidence, subdued demand conditions and concerns in the financial sector are hurting investments, according to the Economist Intelligence Unit, media reports noted. Index of Eight Core Industries carrying 40.27% weight of items included in the Index of Industrial Production (IIP) has declined by 0.5% in August 2019 as compared to the index of August 2018. The index of Eight Core Industries has moved up 2.4% in April to August 2019-20.

Equity Markets: Local stocks declined for second straight trading session on Monday, dragged by weakness in banking and financial stocks. Negative cues from other Asian indices put pressure on the bourses. S&P BSE Sensex fell 155.24 points or 0.40% to 38,667.33. The Nifty 50 index fell 35.15 points or 0.31% to 11,477.25.

Commodities: NBCC (India) has signed a Memorandum of Understanding (MoU) with Ministry of Youth Affairs & Sports (MYAS), Department of Sports, Government of India to Provide Project Management Consultancy for development of National Sports University at Imphal, Manipur. The approximate cost of project would be Rs. 400 crore. Punjab National Bank said that the bank has received amount of capital infusion of Rs 3000 crore towards contribution of Central Government in the preferential allotment of equity shares (Special securities/Bonds) of the bank, as government's investment. Cadila Healthcare entered into an asset purchase agreement to sell its right, title and interest in ZYPITAMAGTM (Pitavastatin), along with applicable registrations and intangible assets relating to



ZYPITAMAG for USA and Canada markets to Medicure Inc., a cardiovascular pharmaceutical company.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(42.6)	55.4	11.2
MF(INR cr)	300.1	593.1	412.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,380	40,168	35,368
F&O(INR cr)	993,216	1,522,069	1,326,739

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.2	15.9	15.6
NSE VIX	15.9	16.0	17.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,103	(2.6) %	(4.0) %	Energy	15,502	0.8 %	(6.2) %
IT	15,540	2.0 %	(1.9) %	Pharma	7,548	(1.9) %	(19.5) %
Metals	2,440	(0.6) %	(21.4) %	Finance	13,017	(2.0) %	4.1 %
Auto	7,493	(0.8) %	(10.9) %	PSU	2,294	(3.5) %	(32.2) %
FMCG	31,135	0.3 %	3.1 %	Real Estate	259	(1.1) %	(3.2) %

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>
Vodafone I	6	8.8 %	(65.4) %	Indiabulls	256	(34.4) %	(69.8) %
Bharti Air	367	5.1 %	17.3 %	Yes Bank	41	(15.1) %	(85.0) %
Oracle Fin	3,173	4.5 %	(6.4) %	L&T Fin.Ho	85	(9.0) %	(44.3) %
HCL Techno	1,081	3.8 %	(2.7) %	IndusInd B	1,384	(6.6) %	(20.6) %
UPL	604	3.8 %	(3.0) %	Piramal En	1,632	(5.5) %	(39.4) %

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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