



02 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,714	1.2 %	4.9 %
BSE SENSEX	35,423	1.1 %	6.5 %
CNX BANK	26,364	0.2 %	8.4 %
CNX MIDCAP	18,181	1.9 %	(4.8) %
CNX SMALLCAP	7,178	2.4 %	(9.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,271	0.2 %	(2.2) %
S&P 500	2,718	0.1 %	0.8 %
FTSE 100	7,637	0.3 %	(0.1) %
HANG SENG	28,955	1.6 %	(5.1) %
NIKKEI	22,305	0.2 %	(5.1) %
SHANGHAI COMPOSITE	2,847	2.2 %	(15.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.47	(0.5) %	7.5 %
EUR/USD	1.17	1.0 %	(2.7) %
GBP/USD	1.32	1.1 %	(2.3) %
USD/JPY	110.76	0.3 %	(1.7) %
USD/AUD	1.35	(0.9) %	5.6 %
USD/SGD	1.36	(0.4) %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	1.0 %	22.8 %
Gold(INR/10g)	30,341	(0.5) %	3.3 %
Gold Comex(USD/oz)	1,254	0.3 %	(4.2) %
SILVER(INR/1Kg)	39,221	(0.5) %	1.6 %
Aluminium(USD/MT)	2,183	0.5 %	(3.2) %
Copper(USD/MT)	6,646	(0.1) %	(7.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Eurozone economic sentiment index fell to 112.3 in June from 112.5 in May, data from the European Commission showed Thursday. The industrial confidence index held steady at 6.9. At the same time, the indicator for retail trade rose slightly to 0.8 from 0.7 in the previous month. Meanwhile, the consumer sentiment index slid to -0.5 in June from +0.2 a month ago. The score matched flash estimate. German forward-looking consumer sentiment index held steady at 10.7 points in July, survey data from market research group GfK showed Thursday. This was slightly above the expected level of 10.6. The route taken by the US President in terms of the trade policy towards the EU is causing concern, GfK said. In contrast, the income expectations and propensity to buy improved in June.

Global Equities: The momentum remained weary as uncertainty over US President Donald Trump's trade policies on China lingered.

Indian Economy: Southwest monsoon has further advanced into some more parts of Gujarat region, most parts of East Rajasthan, some parts of West Rajasthan, entire Haryana, Chandigarh & Delhi, remaining parts of West Uttar Pradesh, Uttarakhand, Himachal Pradesh & Punjab, according to a latest update from the Ministry of Earth Science. Conditions are favourable for further advance of Southwest Monsoon into remaining parts of north Arabian Sea, Gujarat, Rajasthan and thus the entire country during next 2-3 days. Wide spread rainfall activity observed over northwest India with heavy rainfall at isolated places, says the update.

Equity Markets: Local stocks extended losses amid weak global cues. Trading was volatile as traders rolled over positions in the F&O segment from the near month June 2018 series to July 2018 series. The Sensex regained the psychological 35,000 mark in volatile trade. However, overall sentiments remained negative as mid caps tumbled nearly 2% and by index heavyweights like ICICI Bank, Reliance Industries and HDFC also witnessed deep losses. Weak INR also kept the mood sluggish. The INR fell to an all time low above 69 per US dollar.

Corporate News: Tata Consultancy Services has been ranked number one in the IT Services & Software sector in the 2018 All-Asia Executive Team survey published by Institutional Investors. Larsen & Toubro has entered into a Share Purchase Agreement on 27 June 2018 between Marine Infrastructure Developers, L&T Shipbuilding and Adani Kattupalli Port and Adani Ports & Special Economic Zone for the divestment of its entire 97% stake in Marine Infrastructure Developers, a subsidiary, to Adani Ports and Special Economic Zone. Manpasand Beverages has entered into a ten year agreement with Parle Products for joint distribution of their products, pan-India. As a part of this association, both the companies will jointly distribute their products across 4.5 million outlets and aim to achieve a significant market share in their respective categories. Metals and mining counters could stay under continued pressure as global copper futures are struggling around three month lows.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(98.3)	(31.5)	(48.3)
MF(INR cr)	(68.8)	327.7	465.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,885	29,875	33,045
F&O(INR cr)	435,467	886,220	837,077

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.1	13.7	15.3
NSE VIX	12.9	12.8	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	26,364	0.2 %	8.4 %	Energy	13,333	2.6 %	0.3 %
IT	13,990	0.8 %	10.1 %	Pharma	9,173	0.3 %	6.4 %
Metals	3,440	2.8 %	(2.8) %	Finance	11,007	0.5 %	7.3 %
Auto	10,709	0.7 %	(3.2) %	PSU	2,792	1.3 %	(2.2) %
FMCG	28,966	2.0 %	9.3 %	Real Estate	272	2.4 %	(8.4) %

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>
Container	652	6.7 %	5.1 %	Dr Reddy's	2,235	(2.6) %	4.8 %
GAIL (Indi	340	6.5 %	4.8 %	Oracle Fin	4,075	(2.0) %	3.5 %
Petronet L	219	6.2 %	(5.0) %	IndusInd B	1,932	(1.8) %	7.1 %
Emami	529	5.5 %	(3.1) %	Tech Mahin	655	(1.3) %	2.4 %
Titan Comp	879	5.0 %	(6.9) %	Hero Motoc	3,474	(1.2) %	(4.7) %

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					

..... End of Report