



02 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,896	0.3 %	1.9 %
BSE SENSEX	39,687	0.7 %	2.4 %
CNX BANK	31,372	0.0 %	3.4 %
CNX MIDCAP	17,684	0.0 %	(3.5) %
CNX SMALLCAP	6,237	0.0 %	(7.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,717	0.4 %	14.5 %
S&P 500	2,964	0.8 %	18.2 %
FTSE 100	7,498	1.0 %	11.3 %
HANG SENG	28,543	(0.3) %	13.6 %
NIKKEI	21,730	2.1 %	11.1 %
SHANGHAI COMPOSITE	3,045	2.2 %	23.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.86	(0.7) %	(0.8) %
EUR/USD	1.13	(0.4) %	(1.1) %
GBP/USD	1.27	(0.2) %	(0.7) %
USD/JPY	108.34	0.7 %	(1.2) %
USD/AUD	1.43	(0.1) %	0.8 %
USD/SGD	1.35	0.0 %	(0.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(1.6) %	25.6 %
Gold(INR/10g)	33,549	(1.3) %	6.4 %
Gold Comex(USD/oz)	1,413	0.0 %	9.5 %
SILVER(INR/1Kg)	37,391	(0.1) %	(2.3) %
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 US purchasing managers index edged down to 51.7 in June after slipping to 52.1 in May, reflecting concerns about trade and the global economy, the Institute for Supply Management reported on Monday. A reading above 50 still indicates growth in the manufacturing sector. With the continued decrease, the index dropped to its lowest level since hitting a matching reading in October of 2016. The US construction spending fell by 0.8% to an annual rate of \$1.294 trillion in May after climbing by a revised 0.4% to a rate of \$1.304 trillion in April. China's Caixin manufacturing Purchasing Managers' Index fell to 49.4 in June from 50.2 in May on trade disputes, survey results from IHS Markit showed Monday. A score below 50 indicates contraction. Trade tensions caused renewed declines in total sales, export orders and production. Consequently, firms reduced their headcounts.

Global Equities: Improving sentiments in risky assets following the US-China trade truce pushed up the US stocks. The S&P 500 hit a new record closing high and pushed up equities in Asia too.

Indian Economy: India's manufacturing sector growth slowed in June reflecting softer increases in new works, output and employment, survey data from IHS Markit showed on Monday. The headline IHS Markit manufacturing Purchasing Managers' Index fell to 52.1 in June from a 3-month high of 52.7 in May. A score above 50 indicates expansion in the sector. Output growth slowed in June with softer rise in new works. New export orders weakened to the second-lowest over a year. Hiring staffs and purchase of raw materials increased in June. While, job creation slowed, input buying rose to the highest in four months.

Equity Markets: Key equity benchmarks snapped two-day losing streak and ended with strong gains on Monday, mirroring positive global stocks. The Nifty ended above 11,850-mark. Global shares rallied after US President Donald Trump and Chinese President Xi Jinping agreed to hold off on additional tariffs in a bid to reignite trade talks. The barometer index, the S&P BSE Sensex, rose 291.86 points or 0.74% to 39,686.50. The Nifty 50 index rose 76.75 points or 0.65% to 11,865.60.

Corporate News: Tata Motors Commercial and Passenger Vehicles Business sales in the domestic market witnessed a drop of 14% at 49,073 units compared to 56,773 units sold over last year as subdued demand continued in June 2019. TVS Motor Company registered sales of 297,102 units in June 2019 as against 313,614 units in June 2018. Hero MotoCorp announced sales of 616,526 units of motorcycles and scooters in the month of June 2019. It is the second consecutive month this fiscal when the Company has clocked six-lakh plus monthly sales. HCL Technologies confirmed the official close at the end of June 2019 the previously announced acquisition of select IBM products for security, marketing, commerce, and digital solutions.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(82.5)	7.8	74.9
MF(INR cr)	214.6	321.4	111.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,407	26,407	34,305
F&O(INR cr)	591,774	591,774	1,221,597

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.1	15.8	15.2
NSE VIX	14.6	14.6	19.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,372	0.9 %	3.4 %	Energy	15,964	(0.5) %	(3.4) %
IT	15,917	(0.1) %	0.5 %	Pharma	8,179	1.4 %	(12.8) %
Metals	2,978	(0.1) %	(4.0) %	Finance	13,696	1.0 %	9.6 %
Auto	8,029	1.3 %	(4.6) %	PSU	3,218	0.4 %	(4.9) %
FMCG	29,600	0.2 %	(2.0) %	Real Estate	292	2.5 %	9.2 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Zee Entert	358	5.8 %	(17.0) %	B P C L	376	(4.1) %	(4.0) %
General In	228	4.4 %	(7.4) %	O N G C	161	(4.0) %	2.4 %
Dr Reddy's	2,655	4.1 %	(5.0) %	I O C L	152	(2.7) %	(4.4) %
Tata Motor	168	3.4 %	(10.3) %	H P C L	283	(2.6) %	(0.4) %
Motherson	126	3.3 %	(18.0) %	Shriram Tr	1,055	(2.4) %	(14.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Cash Rate Target (JUL 2)	02-07-2019	04:30	AUD	-	0.0125
RBA Governor Lowe speaks in Darwin	02-07-2019	09:30	AUD	-	-
AiG Performance of Service Index (JUN)	02-07-2019	22:30	AUD	-	52.5
CBA Australia PMI Composite (JUN F)	02-07-2019	23:00	AUD	-	53.1
CBA Australia PMI Services (JUN F)	02-07-2019	23:00	AUD	-	53.3
MLI Leading Indicator (MoM) (MAY)	02-07-2019	12:30	CAD	-	0.004
RBC Canadian Manufacturing PMI (JUN)	02-07-2019	13:30	CAD	-	49.1
German Retail Sales (MoM) (MAY)	02-07-2019	06:00	EUR	-	(0.02)
German Retail Sales (YoY) (MAY)	02-07-2019	06:00	EUR	-	0.04
Euro-Zone Producer Price Index (MoM) (MAY)	02-07-2019	09:00	EUR	-	(0.003)
Euro-Zone Producer Price Index (YoY) (MAY)	02-07-2019	09:00	EUR	-	0.026
Nationwide House PX (MoM) (JUN)	02-07-2019	06:00	GBP	-	(0.002)
Nationwide House Px n.s.a. (YoY) (JUN)	02-07-2019	06:00	GBP	-	0.006
Markit/CIPS UK Construction PMI (JUN)	02-07-2019	08:30	GBP	-	48.6
BOE's Carney Speaks in Bournemouth.	02-07-2019	14:05	GBP	-	-
BRC Shop Price Index (YoY) (JUN)	02-07-2019	23:01	GBP	-	0.008
QV House Prices (YoY) (JUN)	02-07-2019	17:00	NZD	-	0.023
Fed's Williams Speaks on Global Economic and Policy Outlook	02-07-2019	10:35	USD	-	-
Fed's Mester to Speak on Economy in London	02-07-2019	15:00	USD	-	-

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