



02 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,980	(1.2) %	(5.9) %
BSE SENSEX	37,018	(1.2) %	(4.8) %
CNX BANK	28,367	(1.8) %	(6.5) %
CNX MIDCAP	15,755	(1.0) %	(14.1) %
CNX SMALLCAP	5,455	(1.2) %	(19.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,583	(1.1) %	14.0 %
S&P 500	2,954	(0.9) %	17.8 %
FTSE 100	7,585	(0.0) %	12.6 %
HANG SENG	27,566	(0.8) %	9.7 %
NIKKEI	21,541	0.1 %	10.1 %
SHANGHAI COMPOSITE	2,909	(0.8) %	18.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.77	0.2 %	(1.0) %
EUR/USD	1.11	(0.2) %	(2.8) %
GBP/USD	1.22	0.1 %	(4.5) %
USD/JPY	108.63	(0.0) %	(0.9) %
USD/AUD	1.45	0.1 %	2.3 %
USD/SGD	1.37	0.0 %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(1.2) %	24.2 %
Gold(INR/10g)	34,532	(0.8) %	9.5 %
Gold Comex(USD/oz)	1,409	(1.4) %	9.2 %
SILVER(INR/1Kg)	40,121	(1.9) %	4.9 %
Aluminium(USD/MT)	1,777	(0.3) %	(4.4) %
Copper(USD/MT)	5,926	(0.3) %	1.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	(0.0) %	(0.6) %

Global Economy: The ISM said its US purchasing managers index fell to 51.2 in July after edging down to 51.7 in June. With the continued decrease, the purchasing managers index dropped to its lowest level since hitting 49.6 in August of 2016. China Caixin factory Purchasing Managers' Index rose to 49.9 in July from 49.4 in June, survey data from IHS Markit showed. A reading below 50 indicates contraction. Chinese factory production was little-changed following a decline in June amid a slight increase in overall new orders. Subdued demand conditions prompted Chinese firms to lower their workforce numbers again in July, noted HIS Markit. Bank of England kept its key interest rates unchanged and downgraded its growth projections. Monetary Policy Committee of BOE led by Governor Mark Carney, unanimously voted to retain the bank rate at 0.75%. Increased uncertainty about the nature of Brexit means that the economy could follow a wide range of paths over coming years, BOE noted. Euro area manufacturing Purchasing Managers' Index fell to 46.5 in July from 47.6 in June, final data from IHS Markit showed. The manufacturing score signalled the sharpest deterioration in operating conditions since December 2012. UK manufacturing sector shrank at the fastest pace in almost six-and-a-half years in July, survey data from IHS Markit revealed. The factory Purchasing Managers' Index remained unchanged at 48.0 in July. Australia manufacturing sector bounced back with a Performance of Manufacturing Index score of 51.3 in July, the latest survey from the Australian Industry Group revealed. That's up from 49.4 in June. Japan manufacturing sector contracted with a manufacturing PMI score of 49.4 in July, up fractionally from 49.3 in June.

Global Equities: US stocks tumbled after President Donald Trump announced plans to impose a 10 percent tariff on the remaining \$300 billion worth of Chinese imports.

Indian Economy: Monsoon rainfall during the second half of the monsoon (August and September) for the country as a whole is forecast to 100% of the long period average (LPA) with a model error of ±8%, according to the long-range forecast for the second half of the monsoon issued by IMD. The rainfall during second half of the monsoon season is most likely to be normal (94 -106% of LPA) with a probability of 45%. Rainfall for August is likely to be 99% (± 9%) of LPA as was predicted in June. The IMD also retained the forecast for the seasonal (June to September) rainfall over the country as a whole to be likely to be normal (96% ± 4%).

Equity Markets: Local market ended steeply lower on Thursday, tracking losses in broader Asia. Global sentiment was dampened after US Federal Reserve Chairman Jerome Powell ruled out a lengthy easing cycle after delivering the first rate cut since the financial crisis. Nifty closed below 11000-mark for the first time since 5 March 2019. S&P BSE Sensex fell 462.80 points or 1.23% to 37,018.32. Nifty 50 index fell 105.40 points or 1.24% to 10,980.

Corporate News: Tata Consultancy Services has been recognized as a Leader in the Everest Group PEAK Matrix™ for Banking BPS. Wipro Limited unveiled the Wipro-AWS Launch Pad, a state-of-the-art immersive co-innovation center in collaboration with Amazon Web Services (AWS). Bharti Airtel August 1 reported a consolidated net loss of Rs 2,866 crore in the quarter ended June 2019 against profit of Rs 107.2 crore in the quarter ended March 2019. EBITDA grew nearly 25% to Rs 8,492.6 crore and the margin expanded 700 bps to 41% from 33%.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(212.9)	(84.1)	30.8
MF(INR cr)	2,897.6	655.8	263.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,543	35,543	34,081
F&O(INR cr)	2,799,623	2,799,623	1,253,152

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.1	13.3	14.7
NSE VIX	14.6	14.6	17.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,367	(1.8) %	(6.5) %	Energy	14,590	0.2 %	(11.7) %
IT	15,332	(1.8) %	(3.2) %	Pharma	7,879	(1.4) %	(16.0) %
Metals	2,507	(3.1) %	(19.2) %	Finance	12,494	(1.7) %	(0.0) %
Auto	6,856	0.1 %	(18.5) %	PSU	2,684	(2.6) %	(20.7) %
FMCG	28,925	(0.5) %	(4.2) %	Real Estate	265	(1.1) %	(1.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharti Inf	251	2.1 %	(20.1) %	Vedanta	145	(5.6) %	(23.0) %
Wipro	270	1.9 %	3.3 %	JSW Steel	225	(5.1) %	(22.9) %
Maruti Suz	5,573	1.9 %	(18.5) %	ICICI Lomb	1,151	(4.6) %	13.4 %
Power Grid	214	1.5 %	9.4 %	St Bk of I	317	(4.5) %	(1.7) %
Page Indus	18,436	1.4 %	(27.8) %	Tata Motor	130	(4.5) %	(30.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Producer Price Index (QoQ) (2Q)	02-08-2019	1:30	AUD	-	0.004
Producer Price Index (YoY) (2Q)	02-08-2019	1:30	AUD	-	0.019
Retail Sales (MoM) (JUN)	02-08-2019	1:30	AUD	-	0.001
Retail Sales Ex Inflation (QoQ) (2Q)	02-08-2019	1:30	AUD	-	(0.001)
International Merchandise Trade (Canadian dollar) (JUN)	02-08-2019	12:30	CAD	-	-
Consumer Price Index (MoM) (JUL)	02-08-2019	6:30	CHF	-	0
Consumer Price Index (YoY) (JUL)	02-08-2019	6:30	CHF	-	0.006
CPI Core (YoY) (JUL)	02-08-2019	6:30	CHF	-	0.007
CPI EU Harmonized (MoM) (JUL)	02-08-2019	6:30	CHF	-	0.002
CPI EU Harmonized (YoY) (JUL)	02-08-2019	6:30	CHF	-	0.007
PMI Manufacturing (JUL)	02-08-2019	7:30	CHF	-	47.7
Euro-Zone Producer Price Index (MoM) (JUN)	02-08-2019	9:00	EUR	-	(0.001)
Euro-Zone Producer Price Index (YoY) (JUN)	02-08-2019	9:00	EUR	-	0.016
Euro-Zone Retail Sales (MoM) (JUN)	02-08-2019	9:00	EUR	-	(0.003)
Euro-Zone Retail Sales (YoY) (JUN)	02-08-2019	9:00	EUR	-	0.013
Markit/CIPS UK Construction PMI (JUL)	02-08-2019	8:30	GBP	-	43.1
Average Hourly Earnings (MoM) (JUL)	02-08-2019	12:30	USD	-	0.002
Average Hourly Earnings (YoY) (JUL)	02-08-2019	12:30	USD	-	0.031
Average Weekly Hours All Employees (JUL)	02-08-2019	12:30	USD	-	34.4
Change in Manufact. Payrolls (JUL)	02-08-2019	12:30	USD	-	-
Change in Non-farm Payrolls (JUL)	02-08-2019	12:30	USD	-	-
Change in Private Payrolls (JUL)	02-08-2019	12:30	USD	-	-
Labor Force Participation Rate (JUL)	02-08-2019	12:30	USD	-	0.629
Trade Balance (JUN)	02-08-2019	12:30	USD	-	-
Two-Month Payroll Net Revision (JUL)	02-08-2019	12:30	USD	-	-
Underemployment Rate (JUL)	02-08-2019	12:30	USD	-	0.072
Unemployment Rate (JUL)	02-08-2019	12:30	USD	-	0.037
Cap Goods Orders Nondef Ex Air (JUN F)	02-08-2019	14:00	USD	-	0.019
Cap Goods Orders Nondef Ex Air (JUN F)	02-08-2019	14:00	USD	-	0.006



Durable Goods Orders (JUN F)	02-08-2019	14:00	USD	-	0.02
Durables Ex Transportation (JUN F)	02-08-2019	14:00	USD	-	0.012
Factory Orders (JUN)	02-08-2019	14:00	USD	-	(0.007)
Factory Orders Ex Trans (JUN)	02-08-2019	14:00	USD	-	0.001
U. of Mich. 1 Yr Inflation (JUL F)	02-08-2019	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (JUL F)	02-08-2019	14:00	USD	-	0.026
U. of Mich. Current Conditions (JUL F)	02-08-2019	14:00	USD	-	111.1
U. of Mich. Expectations (JUL F)	02-08-2019	14:00	USD	-	90.1
U. of Mich. Sentiment (JUL F)	02-08-2019	14:00	USD	-	98.4
Baker Hughes U.S. Rig Count (AUG 2)	02-08-2019	17:00	USD	-	946

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