



03 Jul.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,910	0.4 %	2.1 %
BSE SENSEX	39,816	0.3 %	2.4 %
CNX BANK	31,283	(0.3) %	3.2 %
CNX MIDCAP	17,750	0.4 %	(3.2) %
CNX SMALLCAP	6,232	(0.1) %	(7.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,787	0.3 %	14.8 %
S&P 500	2,973	0.3 %	18.6 %
FTSE 100	7,559	0.8 %	12.3 %
HANG SENG	28,876	1.2 %	14.9 %
NIKKEI	21,754	0.1 %	11.2 %
SHANGHAI COMPOSITE	3,044	(0.0) %	23.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	68.83	(0.4) %	(0.9) %
EUR/USD	1.13	(0.7) %	(1.4) %
GBP/USD	1.26	(0.5) %	(1.0) %
USD/JPY	108.16	0.3 %	(1.3) %
USD/AUD	1.43	0.2 %	0.7 %
USD/SGD	1.36	0.1 %	(0.6) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	1.1 %	27.0 %
Gold(INR/10g)	33,577	0.1 %	6.5 %
Gold Comex(USD/oz)	1,413	0.0 %	9.5 %
SILVER(INR/1Kg)	37,020	(1.0) %	(3.3) %
Aluminium(USD/MT)	1,778	0.3 %	(4.3) %
Copper(USD/MT)	5,999	0.5 %	2.7 %

**FIXED INCOME**

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

**Global Economy:** Eurozone producer price inflation slowed for the third consecutive month in May, data from Eurostat showed on Tuesday. The industrial producer price index rose 1.6% year-on-year in May following a 2.6% rise in April. The UK construction sector contracted the most in more than a decade in June, survey data from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply Purchasing Managers' Index fell to 43.1 in June from 48.6 in May. UK house prices increased marginally, data from Nationwide Building Society showed. House prices rose 0.5% year-on-year in June, following a 0.6% increase in May. Australia's central bank cut its key interest rate by 25 basis points to 1% to address slowing growth and rising unemployment.

**Global Equities:** US stocks saw cautious moves on uncertainty about global trade. The US has proposed new tariffs on more European goods as part of an ongoing dispute over aircraft subsidies.

**Indian Economy:** The Reserve Bank modulates the system liquidity from time to time and undertakes liquidity operations as per requirement. The liquidity in the system has remained largely in surplus during June 2019 and the amount of surplus has progressively increased in the past few days. The buildup of transient liquidity in the past few weeks has led to the movement of both durable and transient liquidity in the same direction. This necessitates absorption of transient liquidity over a slightly longer period while continuing to meet the durable liquidity requirements for the FY 2019-20 on a consistent basis. Accordingly, Reserve Bank will conduct a Variable Rate Reverse Repo auction of Rs 250 billion (Rs 25,000 crore) for 63-day tenor on July 03, 2019.

**Equity Markets:** Local stocks ended higher for the second consecutive trading session amid good buying support following steady global cues. Markets are fully focussing on the budget now. The barometer index, the S&P BSE Sensex, rose 129.98 points or 0.33% to 39,816.48. The Nifty 50 index rose 44.70 points or 0.38% to 11,910.30.

**Corporate News:** Persistent Systems has completed the acquisition of Persistent Systems Germany GmbH and Youperience GmbH. Ramco Systems announced that Erickson Incorporated has selected Ramco Systems to implement its Aviation M&E MRO Solution V5.8. Managing Director and Group CEO of Tata Communications Vinod Kumar, resigned from the company on July 2 citing personal reasons. State-run Oil India has won 12 exploration licenses, the highest in the latest rounds of oilfield auction.



## 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)	27,810	27,109	34,200
F&O(INR cr)	965,185	778,480	1,217,461

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.1	14.1	15.2
NSE VIX	14.3	14.4	19.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,283	(0.3) %	3.2 %	Energy	16,122	1.0 %	(2.5) %
IT	16,074	1.0 %	1.5 %	Pharma	8,102	(0.9) %	(13.6) %
Metals	2,993	0.5 %	(3.5) %	Finance	13,743	0.3 %	9.9 %
Auto	8,046	0.2 %	(4.4) %	PSU	3,201	(0.5) %	(5.4) %
FMCG	29,711	0.4 %	(1.6) %	Real Estate	288	(1.5) %	7.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
UPL	656	3.8 %	5.3 %	Yes Bank	101	(7.7) %	(63.5) %
Indiabulls	642	3.3 %	(24.2) %	HDFC AMC	2,001	(3.8) %	28.6 %
Oracle Fin	3,257	3.0 %	(3.9) %	General In	222	(2.5) %	(9.8) %
O N G C	166	2.9 %	5.3 %	Tata Motor	164	(2.5) %	(12.6) %
Eicher Mot	20,137	2.6 %	0.4 %	Vodafone I	12	(2.5) %	(34.1) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (MAY)	03-07-2019	01:30	AUD	-	(0.047)
Building Approvals (YoY) (MAY)	03-07-2019	01:30	AUD	-	(0.242)
Trade Balance (MAY)	03-07-2019	01:30	AUD	-	-
International Merchandise Trade (Canadian dollar) (MAY)	03-07-2019	12:30	CAD	-	-
Caixin China PMI Composite (JUN)	03-07-2019	01:45	CNY	-	51.5
Caixin China PMI Services (JUN)	03-07-2019	01:45	CNY	-	52.7
Markit Italy Composite PMI (JUN)	03-07-2019	07:45	EUR	-	49.9
Markit Italy Services PMI (JUN)	03-07-2019	07:45	EUR	-	50
Markit France Composite PMI (JUN F)	03-07-2019	07:50	EUR	-	52.9
Markit France Services PMI (JUN F)	03-07-2019	07:50	EUR	-	53.1
Markit Germany Services PMI (JUN F)	03-07-2019	07:55	EUR	-	55.6
Markit/BME Germany Composite PMI (JUN F)	03-07-2019	07:55	EUR	-	52.6
Markit Eurozone Composite PMI (JUN F)	03-07-2019	08:00	EUR	-	52.1
Markit Eurozone Services PMI (JUN F)	03-07-2019	08:00	EUR	-	53.4
Markit/CIPS UK Composite PMI (JUN)	03-07-2019	08:30	GBP	-	50.9
Markit/CIPS UK Services PMI (JUN)	03-07-2019	08:30	GBP	-	51
Official Reserves (Changes) (JUN)	03-07-2019	08:30	GBP	-	-
BOE's Cunliffe Speaks in Lisbon.	03-07-2019	10:00	GBP	-	-
BOE's Broadbent speaks in London.	03-07-2019	12:15	GBP	-	-
Markit Japan PMI Composite (JUN)	03-07-2019	00:30	JPY	-	50.7
Markit Japan PMI Services (JUN)	03-07-2019	00:30	JPY	-	51.7
BOJ Outright Bond Purchase 1~3 Years	03-07-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	03-07-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	03-07-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	03-07-2019	01:10	JPY	-	-
BOJ Funo speaks in Hiroshima	03-07-2019	01:30	JPY	-	-
Foreign Buying Japan Bonds (JUN 28)	03-07-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 28)	03-07-2019	23:50	JPY	-	-
Japan Business Services Balance (YoY) (JUN 28)	03-07-2019	23:50	JPY	-	-



Japan Buying Foreign Stocks (Yen) (JUN 28)	03-07-2019	23:50	JPY	-	-
ANZ Commodity Price (JUN)	03-07-2019	01:00	NZD	-	0
MBA Mortgage Applications (JUN 28)	03-07-2019	11:00	USD	-	0.013
Challenger Job Cuts (YoY) (JUN)	03-07-2019	11:30	USD	-	0.859
ADP Employment Change (JUN)	03-07-2019	12:15	USD	-	-
Continuing Claims (JUN 22)	03-07-2019	12:30	USD	-	-
Initial Jobless Claims (JUN 29)	03-07-2019	12:30	USD	-	-
Trade Balance (MAY)	03-07-2019	12:30	USD	-	-
Markit US Composite PMI (JUN F)	03-07-2019	13:45	USD	-	50.6
Markit US Services PMI (JUN F)	03-07-2019	13:45	USD	-	50.7
Cap Goods Orders Nondef Ex Air (MAY F)	03-07-2019	14:00	USD	-	0.004
Cap Goods Ship Nondef Ex Air (MAY F)	03-07-2019	14:00	USD	-	0.007
Durable Goods Orders (MAY F)	03-07-2019	14:00	USD	-	(0.013)
Durables Ex Transportation (MAY F)	03-07-2019	14:00	USD	-	0.003
Factory Orders (MAY)	03-07-2019	14:00	USD	-	(0.008)
Factory Orders Ex Trans (MAY)	03-07-2019	14:00	USD	-	0.003
ISM Non-Manufacturing/Services Composite (JUN)	03-07-2019	14:00	USD	-	56.9
DOE Cushing OK Crude Inventory (JUN 28)	03-07-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 28)	03-07-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 28)	03-07-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 28)	03-07-2019	14:30	USD	-	-
U.S. to Sell 4-Week Bills	03-07-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	03-07-2019	15:30	USD	-	-
EIA Natural Gas Storage Change (JUN 28)	03-07-2019	16:00	USD	-	98
Baker Hughes U.S. Rig Count (JUL 5)	03-07-2019	17:00	USD	-	967

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