



03 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,896	(1.2) %	(6.6) %
BSE SENSEX	37,333	0.7 %	(5.0) %
CNX BANK	26,983	(1.6) %	(11.0) %
CNX MIDCAP	15,545	(0.7) %	(15.2) %
CNX SMALLCAP	5,407	(0.7) %	(19.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,403	0.2 %	13.2 %
S&P 500	2,926	0.1 %	16.7 %
FTSE 100	7,282	1.0 %	8.1 %
HANG SENG	25,627	(0.4) %	2.0 %
NIKKEI	20,620	(0.4) %	5.4 %
SHANGHAI COMPOSITE	2,924	1.3 %	18.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.56	(0.2) %	3.1 %
EUR/USD	1.10	(0.4) %	(3.8) %
GBP/USD	1.22	(0.2) %	(4.5) %
USD/JPY	106.36	0.1 %	(3.0) %
USD/AUD	1.49	0.1 %	4.7 %
USD/SGD	1.39	0.0 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	0.0 %	18.0 %
Gold(INR/10g)	38,405	(0.9) %	21.8 %
Gold Comex(USD/oz)	1,538	0.0 %	19.2 %
SILVER(INR/1Kg)	46,688	(0.8) %	22.0 %
Aluminium(USD/MT)	1,717	0.0 %	(7.6) %
Copper(USD/MT)	5,611	0.0 %	(3.9) %

FIXED INCOME

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

Global Economy: The US consumer sentiment index for August was downwardly revised to 89.8 from the preliminary reading of 92.1. Chicago-area business activity unexpectedly returned to expansion in the month of August. MNI Indicators said its Chicago business barometer jumped to 50.4 in August after tumbling to 44.4 in July, with a reading above 50 indicating growth in regional business activity. The US Commerce Department said personal income inched up by 0.1% in July after climbing by an upwardly revised 0.5% in June. The US personal spending grew by 0.6% in July after an unrevised 0.3% gain in June. China's manufacturing sector recovered in August largely driven by the fastest growth in production in five months, survey data from IHS Markit showed Monday. The Caixin factory Purchasing Managers' Index (PMI) rose to 50.4 in August from 49.9 in July. The official manufacturing PMI dropped to 49.5 in August from 49.7 in July. Meanwhile, the non-manufacturing PMI improved to 53.8 from 53.7, data released over the weekend showed. Eurozone manufacturing sector continued to contract for the seventh straight month in August but the pace of decline slowed from previous month, final data from IHS Markit showed Monday. The PMI rose to 47.0 in August from 46.5 in July. This was the second lowest reading since April 2013.

Global Equities: US stocks were closed for a public holiday yesterday. Sentiment in risky assets is weak on new round of retaliatory tariffs by the US and China took effect over the weekend.

Indian Economy: India's manufacturing growth slowed in August to its weakest level in over a year. The headline IHS Markit manufacturing PMI fell to 51.4 in August from 52.5 in July. India's eight infrastructure industries growth, which make up for two-fifth of the index of industrial production (IIP), dropped to 2.1% in July compared to 7.3% in the same month a year ago. India's GDP growth moderated to 25-quarters low of 5.0% in Q1 of 2019-20 from 5.8% growth recorded in the previous quarter and 8.0% improvement in the corresponding quarter last year. Quarterly Gross Value Added (GVA) growth also eased to 4.9% in Q1 of 2019-20 from 5.7% in Q4 of 2018-19 and 7.7% in Q1 of 2018-19.

Equity Markets: The domestic stock market bounced back on Friday, amid positive global cues. The barometer index, the S&P BSE Sensex, rose 263.86 points or 0.71% to 37,332.79. The Nifty 50 index rose 74.95 points or 0.68% to 11,023.25.

Corporate News: The finance minister has announced the mega merger of public sector bank (PSBs) reducing the number of PSBs to 12 banks furthering the processing of consolidation in the public sector banks compared with 27 PSBs in 2017. The finance minister has announced 4 sets of merger including the merger of Punjab National Bank, Oriental Bank of Commerce and United Bank of India to emerge as second largest PSB with Rs 18 lakh crore business and second largest branch network in India. Canara Bank and Syndicate Bank would be merged to emerge as fourth largest PSB with Rs 15.2 lakh core business and 3rd largest branch network in India. Union Bank of India would be merged with Andhra Bank and Corporation Bank to emerge as 5th largest PSB with Rs 14.6 lakh crore business and 4th largest branch network in India. Indian Bank and Allahabad Bank would be merged to emerge as 7th largest PSB with Rs 8.08 lakh crore business. Maruti Suzuki India said its total sales fell 32.7% to 1.06 lakh units in August 2019 over August 2018. Tata Motors announced its sales in the domestic & international market, stood at 32,343 vehicles in August 2019 compared to 62,688 units during August 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(87.1)	(119.9)	2.8
MF(INR cr)	305.9	921.7	380.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,745	36,222	34,483
F&O(INR cr)	928,907	1,523,889	1,290,708

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.0	19.0	15.6
NSE VIX	16.3	16.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,428	0.4 %	(9.6) %	Energy	14,382	(0.4) %	(13.0) %
IT	16,010	0.8 %	1.1 %	Pharma	8,072	2.0 %	(13.9) %
Metals	2,290	1.6 %	(26.2) %	Finance	12,418	0.6 %	(0.7) %
Auto	7,009	0.6 %	(16.7) %	PSU	2,474	1.0 %	(26.9) %
FMCG	29,257	1.8 %	(3.1) %	Real Estate	267	1.3 %	0.0 %

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	5	10.3 %	(69.9) %	Bharti Inf	250	(3.1) %	(20.3) %
General In	179	5.6 %	(27.5) %	Coal India	185	(2.2) %	(21.8) %
HDFC AMC	2,552	4.9 %	64.0 %	H P C L	260	(2.2) %	(8.3) %
Page Indus	18,661	4.7 %	(26.9) %	Power Grid	201	(2.1) %	2.5 %
NMDC	83	4.5 %	(21.1) %	Ashok Leyl	64	(2.0) %	(28.7) %

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					

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