



03 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,008	0.0 %	7.8 %
BSE SENSEX	36,526	0.8 %	9.8 %
CNX BANK	25,367	0.0 %	4.3 %
CNX MIDCAP	17,285	0.0 %	(9.5) %
CNX SMALLCAP	6,167	0.0 %	(22.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,774	0.5 %	7.9 %
S&P 500	2,923	(0.0) %	8.4 %
FTSE 100	7,475	(0.3) %	(2.3) %
HANG SENG	27,126	(2.4) %	(11.1) %
NIKKEI	24,271	0.1 %	3.3 %
SHANGHAI COMPOSITE	2,821	1.1 %	(15.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.91	0.6 %	14.5 %
EUR/USD	1.16	(0.3) %	(3.7) %
GBP/USD	1.30	0.0 %	(3.5) %
USD/JPY	113.96	0.2 %	1.1 %
USD/AUD	1.38	(0.1) %	8.2 %
USD/SGD	1.37	0.4 %	2.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	2.3 %	21.3 %
Gold(INR/10g)	30,499	0.7 %	3.9 %
Gold Comex(USD/oz)	1,196	0.6 %	(8.6) %
SILVER(INR/1Kg)	37,777	2.1 %	(2.1) %
Aluminium(USD/MT)	2,012	(0.9) %	(10.8) %
Copper(USD/MT)	6,180	(0.7) %	(13.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

Global Economy: The Institute for Supply Management (ISM) said that its purchasing managers index (PMI) fell to 59.8 in September from 61.3 in August, although a reading above 50 still indicates growth in the manufacturing sector. The slightly bigger than expected decrease by the index came after it reached its highest level in over fourteen years in August. A slowdown in the pace of new orders growth contributed to the pullback by the headline index, with the new orders index sliding to 61.8 in September from 65.1 in August. Eurozone factory PMI fell to 53.2, the lowest since September 2016, from 54.6 in August, final data from IHS Markit showed Monday. The initial estimate was 53.3. Nonetheless, the sector expanded the current period of expansion to 63 months. Japan's consumer confidence rose slightly in September, survey data from Cabinet Office showed Tuesday. The consumer sentiment index improved to 43.4 from a one-year low of 43.3 seen in August. Australia's central bank decided to keep its benchmark interest rate unchanged at a record low, for the 25th consecutive meeting. The board of the Reserve Bank of Australia voted to maintain the cash rate at 1.50%.

Global Equities: DOW soared to fresh high as the US and Canadian officials agreed on a trade deal to replace the North American Free Trade Agreement with a new trade deal called the United States-Mexico-Canada Agreement.

Indian Economy: India headline Nikkei/IHS Markit manufacturing Purchasing Managers' Index rose to 52.2 in September from 51.7 in August, survey data showed Monday. A score above 50 indicates expansion in the sector. The survey showed that solid growth of the manufacturing sector in the latest survey period extended the current run of expansion to 14 months. New orders advanced strongly driven by both domestic and foreign demand. With new work increasing, manufacturing production was subsequently raised for a fourteenth successive month. There was a further increase in manpower in September.

Equity Markets: Bargain hunting continued to support local stocks. Trading for the month of October started on a positive note, with benchmark indices snapping their three-day losing streak led by gains in HDFC, TCS, Infosys and HDFC Bank. The Nifty managed to close above 11,000-mark.

Corporate News: HCL Technologies said that it has completed the acquisition of engineering services provider H&D International. MEP Infrastructure Developers announced that CRISIL has upgraded the long term rating for bank facilities aggregating Rs 2533 crore from CRISIL D to CRISIL B/ Stable and has withdrawn its rating on the long term bank facilities of MEP Infrastructure. The Board of Minda Corporation approved the scheme for amalgamation of domestic Indian wholly owned subsidiary companies into Minda Corp. This Scheme of amalgamation is subject to necessary statutory and regulatory approvals including the approval of the jurisdictional National Company Law Tribunals. Indraprastha Gas, India's biggest city gas retailer, is looking at setting up CNG dispensing stations within residential housing complexes to ease queues at CNG pumps. Sun Pharma says its India business to stabilise in the current fiscal leading to reasonable volume growth after witnessing disruptions in 2017-18 due to GST implementation, media reports stated.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(234.1)	(73.0)	(33.6)
MF(INR cr)	(916.8)	465.0	379.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,158	42,158	34,992
F&O(INR cr)	774,323	774,323	953,837

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.1	12.9	14.1
NSE VIX	16.8	16.8	13.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,367	1.0 %	4.3 %	Energy	15,540	(1.0) %	16.9 %
IT	16,214	2.4 %	27.6 %	Pharma	10,034	0.6 %	16.4 %
Metals	3,528	1.2 %	(0.3) %	Finance	10,707	1.2 %	4.3 %
Auto	9,660	0.7 %	(12.7) %	PSU	2,799	3.6 %	(2.0) %
FMCG	29,924	0.6 %	12.9 %	Real Estate	216	(1.5) %	(27.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	201	9.4 %	(34.4) %	Bandhan Ba	452	(20.0) %	(4.9) %
Sun TV Net	654	6.4 %	(24.0) %	Bharti Air	327	(3.5) %	(17.3) %
Hindalco I	243	5.8 %	15.0 %	Aditya Bir	111	(3.4) %	(27.1) %
Indiabulls	906	5.7 %	(27.2) %	Avenue Sup	1,349	(3.4) %	(0.6) %
Bank of Ba	104	4.9 %	(26.4) %	H P C L	243	(3.3) %	(29.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (AUG)	03-10-2018	01:30	AUD	-	(0.052)
Building Approvals (YoY) (AUG)	03-10-2018	01:30	AUD	-	(0.056)
CBA Australia PMI Composite (SEP)	03-10-2018	23:00	AUD	-	52
CBA Australia PMI Services (SEP)	03-10-2018	23:00	AUD	-	51.8
KOF Institute Autumn Economic Forecast	03-10-2018	08:00	CHF	-	-
Markit/ADACI Italy Composite PMI (SEP)	03-10-2018	07:45	EUR	-	51.7
Markit/ADACI Italy Services PMI (SEP)	03-10-2018	07:45	EUR	-	52.6
Markit France Composite PMI (SEP F)	03-10-2018	07:50	EUR	-	53.6
Markit France Services PMI (SEP F)	03-10-2018	07:50	EUR	-	54.3
Markit Germany Services PMI (SEP F)	03-10-2018	07:55	EUR	-	56.5
Markit/BME Germany Composite PMI (SEP F)	03-10-2018	07:55	EUR	-	55.3
Markit Eurozone Composite PMI (SEP F)	03-10-2018	08:00	EUR	-	54.2
Markit Eurozone Services PMI (SEP F)	03-10-2018	08:00	EUR	-	54.7
Euro-Zone Retail Sales (MoM) (AUG)	03-10-2018	09:00	EUR	-	(0.002)
Euro-Zone Retail Sales (YoY) (AUG)	03-10-2018	09:00	EUR	-	0.011
Markit/CIPS UK Composite PMI (SEP)	03-10-2018	08:30	GBP	-	54.2
Markit/CIPS UK Services PMI (SEP)	03-10-2018	08:30	GBP	-	54.3
Official Reserves (Changes) (SEP)	03-10-2018	08:30	GBP	-	-
Nikkei Japan PMI Composite (SEP)	03-10-2018	00:30	JPY	-	52
Nikkei Japan PMI Services (SEP)	03-10-2018	00:30	JPY	-	51.5
Foreign Buying Japan Bonds (SEP 28)	03-10-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (SEP 28)	03-10-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (SEP 28)	03-10-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (SEP 28)	03-10-2018	23:50	JPY	-	-
ANZ Commodity Price (SEP)	03-10-2018	00:00	NZD	-	(0.011)
Fed's Evans Speaks in London	03-10-2018	10:30	USD	-	-
MBA Mortgage Applications (SEP 28)	03-10-2018	11:00	USD	-	-
Fed's Barkin Speaks at Economic Conference in West Virginia	03-10-2018	12:05	USD	-	-
ADP Employment Change (SEP)	03-10-2018	12:15	USD	-	-



Markit US Composite PMI (SEP F)	03-10-2018	13:45	USD	-	53.4
Markit US Services PMI (SEP F)	03-10-2018	13:45	USD	-	52.9
ISM Non-Manufacturing/Services Composite (SEP)	03-10-2018	14:00	USD	-	58.5
DOE Cushing OK Crude Inventory (SEP 28)	03-10-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 28)	03-10-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (SEP 28)	03-10-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (SEP 28)	03-10-2018	14:30	USD	-	-
Fed's Brainard Speaks in Chicago About Payment System	03-10-2018	18:15	USD	-	-
Fed's Mester Speaks at Community Banking Conference	03-10-2018	18:15	USD	-	-

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