



03 Oct.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,360	0.0 %	(2.7) %
BSE SENSEX	38,305	(0.9) %	(1.3) %
CNX BANK	28,726	0.0 %	(5.3) %
CNX MIDCAP	15,725	0.0 %	(14.2) %
CNX SMALLCAP	5,493	0.0 %	(18.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,079	(1.9) %	11.8 %
S&P 500	2,888	(1.8) %	15.2 %
FTSE 100	7,123	(3.2) %	5.8 %
HANG SENG	26,043	(0.2) %	3.6 %
NIKKEI	21,779	(0.5) %	11.3 %
SHANGHAI COMPOSITE	2,905	(0.9) %	17.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.43	0.1 %	1.4 %
EUR/USD	1.09	(0.2) %	(4.7) %
GBP/USD	1.23	0.1 %	(3.5) %
USD/JPY	108.00	0.0 %	(1.5) %
USD/AUD	1.48	0.1 %	4.2 %
USD/SGD	1.38	(0.0) %	1.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(2.8) %	16.7 %
Gold(INR/10g)	37,201	(0.7) %	18.0 %
Gold Comex(USD/oz)	1,474	(1.9) %	14.2 %
SILVER(INR/1Kg)	44,139	(0.1) %	15.4 %
Aluminium(USD/MT)	1,704	(0.6) %	(8.3) %
Copper(USD/MT)	5,728	0.2 %	(1.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.2 %	(1.0) %

**Global Economy:** World merchandise trade volumes are now expected to rise by only 1.2% in 2019, substantially slower than the 2.6% growth forecast in April, according to WTO. The projected increase in 2020 is now 2.7%, down from 3.0% previously. The US manufacturing purchasing managers' index (PMI) came in at 47.8% in September, the lowest since June 2009, marking the second consecutive month of contraction. Euro area manufacturing sector contracted at the fastest pace in nearly seven years. The final manufacturing PMI dropped to 45.7 in September from 47.0 in August. The reading was just above the flash estimate of 45.6. Eurozone consumer inflation slipped in September. Inflation came in at 0.9% in September versus 1% in August. UK manufacturing PMI rose to 48.3 in September from August's six-and-a-half year low of 47.4 but stayed in contraction zone under 50. Japan's Jibun Bank final manufacturing PMI fell to 48.9 in September from 49.3 in August. The reading came in line with the flash estimate. Manufacturing sector contracted the most in seven months in September as firms reduced production amid weak demand. Japan jobless rate came in at a seasonally adjusted 2.2% in August, unchanged from the previous month. Australia's central bank decided to reduce the cash rate by 25 basis points to 0.75%. The bank had earlier lowered its rate in June and July. The back-to-back rate cut in July was the first since mid-2012.

**Global Equities:** US stocks crashed to around one month low on weak economic cues. DOW slipped around 2%.

**Indian Economy:** Headline seasonally adjusted IHS Markit India Manufacturing PMI was at 51.4 in September, unchanged from August and thereby posting its joint-lowest reading since May 2018. The figure still showed an improvement in the health of the sector, although one that was historically subdued. Total gross GST revenue collected in the month of September 2019 is Rs 91916 crore. The revenue during September 2019 has declined by 2.67% in comparison to the revenue during September 2018. During April-September 2019 vis-à-vis 2018, the domestic component has grown by 7.82% while the GST on imports has shown negative growth and the total collection has grown by 4.90%. India's fiscal deficit stood at Rs 5.54 lakh crore at the end of August, which is 78.7% of the budgeted estimate for the current fiscal year. After the first five months of 2018-19, the fiscal was at Rs 5.91 lakh crore, or 94.7% of the budgeted estimate. All-India Housing Price Index increased by 2.3% on sequential basis (Q1:2019-20 over Q4:2018-19); on a year-on-year basis, however, it extended its moderation into the ninth successive quarter in Q1:2019-20, rising by 3.4% in Q1:2019-20 as against 3.6% in the previous quarter and 5.3% a year ago. India's external debt was placed at US\$ 557.4 billion end-June 2019, recording an increase of US\$ 14.1 billion over its level at end-March 2019.

**Equity Markets:** Key benchmarks tumbled on Tuesday amid selling in banks and financial stocks. Crisis at Punjab and Maharashtra Co-operative Bank (PMC) and fraud allegations against Indiabulls Housing Finance (IHFL) spoiled investors' risk appetite. S&P BSE Sensex fell 361.92 points or 0.94% to 38,305.41, as per the provisional closing data. The Nifty 50 index fell 114.55 points or 1% to 11,359.90, as per the provisional closing data.

**Corporate News:** Tata Consultancy Services announced that the TCS HOBS' platform is powering Jurassic Fibre's new, ultrafast full fibre optic broadband offerings to towns and rural communities in the South West of England. APL Apollo Tubes Limited registered a strong sales volume of 3,63,994 MTPA in Q2 FY20, higher by 20% Y-o-Y from 3,04,058 MTPA in Q2 FY19. Tata Motors reported a drop of 50% in its domestic passenger car sales to 32,376 units in September 2019. Total commercial vehicle also declined 45.4% to 28,079 units in September. YES Bank has attributed the sharp fall of nearly 23% in its share price on October 1 to the forced sale of 10 crore equity shares, which amount to 3.92% stake in the bank.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(42.3)	50.2	10.8
MF(INR cr)	284.9	576.9	411.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	49,196	49,196	35,480
F&O(INR cr)	1,854,591	1,854,591	1,331,031

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.2	15.9	15.6
NSE VIX	16.8	16.8	17.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,726	(1.3) %	(5.3) %	Energy	15,386	(0.7) %	(6.9) %
IT	15,300	(1.5) %	(3.4) %	Pharma	7,466	(1.1) %	(20.4) %
Metals	2,397	(1.8) %	(22.7) %	Finance	12,996	(0.2) %	4.0 %
Auto	7,464	(0.4) %	(11.3) %	PSU	2,207	(3.8) %	(34.8) %
FMCG	30,801	(1.1) %	2.0 %	Real Estate	248	(4.1) %	(7.1) %

### 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>
NMDC	96	8.7 %	(8.5) %	Yes Bank	32	(22.7) %	(88.4) %
Container	640	5.9 %	20.5 %	Vodafone I	5	(12.2) %	(69.6) %
B P C L	494	5.1 %	26.0 %	Zee Entert	233	(12.2) %	(46.0) %
Indiabulls	268	4.6 %	(68.4) %	DLF	144	(7.3) %	(26.3) %
General In	228	3.5 %	(7.6) %	IndusInd B	1,298	(6.2) %	(25.5) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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