



04 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,686	(0.1) %	4.6 %
BSE SENSEX	35,379	0.3 %	6.2 %
CNX BANK	26,160	(0.2) %	7.5 %
CNX MIDCAP	18,163	(0.4) %	(4.9) %
CNX SMALLCAP	7,167	(0.2) %	(9.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,175	(0.5) %	(2.6) %
S&P 500	2,713	(0.5) %	0.6 %
FTSE 100	7,593	0.6 %	(0.7) %
HANG SENG	28,546	(1.4) %	(6.5) %
NIKKEI	21,786	(0.1) %	(7.3) %
SHANGHAI COMPOSITE	2,787	0.4 %	(16.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.58	0.2 %	7.7 %
EUR/USD	1.17	(0.1) %	(2.8) %
GBP/USD	1.32	(0.0) %	(2.3) %
USD/JPY	110.39	(0.3) %	(2.1) %
USD/AUD	1.35	0.0 %	5.6 %
USD/SGD	1.36	0.1 %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.3 %	22.8 %
Gold(INR/10g)	30,282	(0.2) %	3.1 %
Gold Comex(USD/oz)	1,259	1.5 %	(3.8) %
SILVER(INR/1Kg)	38,930	(0.4) %	0.8 %
Aluminium(USD/MT)	2,165	0.6 %	(4.0) %
Copper(USD/MT)	6,585	(0.2) %	(8.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.1) %	0.4 %

Global Economy: Eurozone retail sales remained flat in May, reversing a 0.1% fall logged in April. On a yearly basis, retail sales growth eased to 1.4% in May from 1.6% in the previous month. UK construction PMI rose to 53.1 in June from 52.5 in May. The latest reading pointed to the sharpest rise in construction output since November 2017. New orders grew at the fastest pace since May 2017. Higher levels of new work contributed to faster increases in employment numbers. Australia central bank decided to retain its key interest rate steady at a record low, as weaker currency supports exports amid fears of trade wars. The board of the Reserve Bank of Australia, governed by Philip Lowe, on Tuesday, voted to maintain the cash rate at 1.50%. The bank had reduced the rate by 25-basis points each in August and May last year.

Global Equities: European shares saw an impressive outing after recent losses. German Chancellor Angela Merkel's coalition government stayed intact after she reached a deal over the country's migration policy.

Indian Economy: In May 2018, the automobile industry's sales volume increased 12% yoy, primarily led by strong growth in MHCV volumes. During the period, CV sales continued to register strong growth at 43% (57% yoy for YTD May 2018). However, the growth rate moderated on a month-on-month basis, according to an update from the India Ratings and Research (Ind-Ra). During April-May 2017, CV sales volume declined due to the transition to BS-IV emission norms from BS-III, which led to significant pre-buying in March 2017 and inadequate supply of BS-IV-compliant vehicles. As a result, MHCV sales volume grew 80% yoy in May 2018 (115% yoy for YTD May 2018).

Equity Markets: Local stocks edged up yesterday as a pullback in second half of the day's trading session helped the key benchmark indices cut steep intraday losses triggered by weak global cues. A revival in monsoon is supporting the sentiments. Heavy to very heavy rainfall is expected in large parts of India, including several places in Jammu and Kashmir, Tamil Nadu, Assam and Gujarat, over the next few days till Friday, the India Meteorological Department (IMD) said.

Corporate News: GE Power India has been awarded twin boiler equipment orders by Bharat Heavy Electricals (BHEL) for supercritical thermal power projects in Patrattu and Udangudi worth approximately Rs 467.9 crore exclusive of taxes (i.e. approximately US \$ 68.3 million). International Finance Corporation (IFC), a member of the World Bank Group, has invested Rs 640 crore (\$100 million) in Mahindra & Mahindra Financial Services (Mahindra Finance). This investment will enable Mahindra Finance to further augment its growth, by extending loans to individuals, including farmers, to buy tractors, vehicles and other equipment, along with financing small and medium enterprises. ISGEC Heavy Engineering has emerged L-1 in reverse auction in order for Flue Gas Desulphurization (FGD) 3 units x 800 MW from NTPC - Kudgi Super Thermal Power Project. The value of the expected order is about Rs 700 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	23.1	23.1	(42.5)
MF(INR cr)	(68.8)	327.7	465.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,575	28,875	32,917
F&O(INR cr)	574,868	568,946	828,952

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.1	15.9	15.3
NSE VIX	13.0	13.2	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,204	(0.1) %	7.7 %	Energy	13,278	1.0 %	(0.1) %
IT	14,223	1.1 %	11.9 %	Pharma	9,325	2.1 %	8.2 %
Metals	3,366	(0.4) %	(4.9) %	Finance	10,910	(0.2) %	6.3 %
Auto	10,779	1.1 %	(2.5) %	PSU	2,772	(0.8) %	(2.9) %
FMCG	28,974	0.7 %	9.3 %	Real Estate	268	0.1 %	(9.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	627	4.0 %	5.8 %	Vedanta	231	(3.7) %	(18.2) %
Cipla	640	3.8 %	11.1 %	Bharti Inf	292	(2.5) %	(13.7) %
Marico	341	2.2 %	3.8 %	B H E L	70	(1.7) %	(15.1) %
Havells In	544	2.0 %	7.1 %	ICICI Bank	273	(1.6) %	4.2 %
Motherson	293	2.0 %	(9.5) %	Colgate-Pa	1,151	(1.5) %	8.8 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (MAY)	04-07-2018	1:30	AUD	-	0.004
Trade Balance (MAY)	04-07-2018	1:30	AUD	-	-
Caixin China PMI Composite (JUN)	04-07-2018	1:45	CNY	-	52.3
Caixin China PMI Services (JUN)	04-07-2018	1:45	CNY	-	52.9
Markit/ADACI Italy Composite PMI (JUN)	04-07-2018	7:45	EUR	-	52.9
Markit/ADACI Italy Services PMI (JUN)	04-07-2018	7:45	EUR	-	53.1
Markit France Composite PMI (JUN F)	04-07-2018	7:50	EUR	-	55.6
Markit France Services PMI (JUN F)	04-07-2018	7:50	EUR	-	56.4
Markit Germany Services PMI (JUN F)	04-07-2018	7:55	EUR	-	53.9
Markit/BME Germany Composite PMI (JUN F)	04-07-2018	7:55	EUR	-	54.2
Markit Eurozone Composite PMI (JUN F)	04-07-2018	8:00	EUR	-	54.8
Markit Eurozone Services PMI (JUN F)	04-07-2018	8:00	EUR	-	55
BOE's Saporta Speaks in London	04-07-2018	10:55	GBP	-	-
BOE's Woods Speaks in London	04-07-2018	8:05	GBP	-	-
Markit/CIPS UK Composite PMI (JUN)	04-07-2018	8:30	GBP	-	54.5
Markit/CIPS UK Services PMI (JUN)	04-07-2018	8:30	GBP	-	54
Official Reserves (Changes) (JUN)	04-07-2018	8:30	GBP	-	-
Nikkei Japan PMI Composite (JUN)	04-07-2018	0:30	JPY	-	51.7
Nikkei Japan PMI Services (JUN)	04-07-2018	0:30	JPY	-	51
BOJ Outright Bond Purchase 1~3 Years	04-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	04-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	04-07-2018	1:10	JPY	-	-
BOJ Harada speaks in Kanazawa	04-07-2018	1:30	JPY	-	-
Foreign Buying Japan Bonds (JUN 29)	04-07-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 29)	04-07-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 29)	04-07-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 29)	04-07-2018	23:50	JPY	-	-
ANZ Commodity Price (JUN)	04-07-2018	1:00	NZD	-	0.015
ANZ Commodity Price (JUN 29)	04-07-2018	11:00	USD	-	(0.010)



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