



04 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,582	0.0 %	13.4 %
BSE SENSEX	38,313	(0.9) %	15.8 %
CNX BANK	27,820	0.0 %	14.3 %
CNX MIDCAP	19,867	0.0 %	4.0 %
CNX SMALLCAP	7,652	0.0 %	(3.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,965	(0.1) %	4.6 %
S&P 500	2,902	0.0 %	7.6 %
FTSE 100	7,505	1.0 %	(1.9) %
HANG SENG	27,713	(0.6) %	(9.2) %
NIKKEI	22,707	(0.7) %	(3.4) %
SHANGHAI COMPOSITE	2,721	(0.2) %	(18.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.20	0.7 %	11.8 %
EUR/USD	1.16	(0.6) %	(3.5) %
GBP/USD	1.29	(1.2) %	(4.9) %
USD/JPY	111.14	0.1 %	(1.4) %
USD/AUD	1.39	0.8 %	8.8 %
USD/SGD	1.37	0.5 %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	(0.6) %	15.6 %
Gold(INR/10g)	30,226	0.0 %	3.0 %
Gold Comex(USD/oz)	1,207	(0.1) %	(7.8) %
SILVER(INR/1Kg)	37,096	0.0 %	(3.9) %
Aluminium(USD/MT)	2,112	(0.7) %	(6.4) %
Copper(USD/MT)	6,019	(0.8) %	(16.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** China's manufacturing activity expanded at the slowest pace in 14 months August, as export orders contracted for a fifth month, a private survey showed on Monday. The Caixin/Markit Manufacturing Purchasing Managers' Index (PMI) dropped to 50.6 in August from July's 50.8. Despite the drop, the index remained above the 50-point mark that separates growth from contraction for the 15th straight month. Eurozone manufacturing Purchasing Managers' Index fell to 54.6 in August, in line with flash estimate, from July's 55.1, survey data from IHS Markit showed. The indicator pointed to the slowest growth since November 2016. Manufacturing output climbed at the fastest pace in three months. Growth strengthened despite the level of new orders increasing at the slowest rate for two years.

**Global Equities:** US President Donald Trump's weekend threats to leave Canada out of the new North American Free Trade Agreement weighed on stocks.

**Indian Economy:** Nikkei India Manufacturing PMI August survey data indicated that operating conditions improved at the slowest pace since May, mainly reflecting slower gains in output and new orders. On the price front, input cost inflation eased further from June's multi-year high and registered below the series trend. Subsequently, firms raised their output charges at the slowest rate since April. Meanwhile, business optimism towards the 12-month outlook for output softened from July's three-month high. The Nikkei India Manufacturing PMI registered at 51.7 in August from 52.3 in July. The latest data pointed to a modest improvement in manufacturing conditions compared to July.

**Equity Markets:** Soaring Crude oil and a tumble in Indian Rupee are weighing on the sentiments in local markets. Domestic shares reversed early gains to end lower in the last hour of trade on Monday. Trading for the week began on a positive note as the key benchmark indices edged higher in early trade boosted by good first-quarter GDP data. Indices extended gains and hit fresh intraday high in morning trade. Stocks trimmed gains in mid-morning trade after data showed that manufacturing PMI has slowed in August.

**Corporate News:** India Inc raised a total of \$2.18 billion funding from overseas markets in July 2018 through external commercial borrowing (ECB), up 74% from a year ago, according to latest data from the Reserve Bank Of India (RBI). Domestic fuel prices are soaring. Petrol price soared to of Rs 79.15 in Delhi and Rs 86.56 per litre in Mumbai, the highest ever for any metro city, on Monday. Consumer sentiment in India moderated in August following a rise in interest rates. The GICI (Genesis India Consumer Indicator) a monthly indicator tracking consumer sentiment pan India across personal finances, business conditions and buying conditions fell to 61.71 in August from the record high of 62.44 seen in July. The Indian rupee touched another intraday record low above of 71.10 per dollar on Monday amid sustained selling pressure. Contrary to popular belief that rupee depreciation helps exporters, currency volatility not always brings benefits for the fraternity, EEPC India said.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(409.0)	(13.9)	(27.0)
MF(INR cr)	(956.4)	167.2	369.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,288	39,288	33,835
F&O(INR cr)	607,405	607,405	890,663

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	12.5	14.3
NSE VIX	13.4	13.4	13.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,820	(0.9) %	14.3 %	Energy	15,599	(1.0) %	17.4 %
IT	15,725	(0.5) %	23.7 %	Pharma	10,360	(0.3) %	20.2 %
Metals	3,657	0.4 %	3.3 %	Finance	11,631	(0.7) %	13.4 %
Auto	10,936	(0.7) %	(1.1) %	PSU	3,284	(1.0) %	15.0 %
FMCG	32,110	(2.4) %	21.2 %	Real Estate	273	(1.0) %	(7.9) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Dr Reddy's	2,593	4.1 %	21.6 %	Bajaj Fin.	2,724	(4.6) %	49.8 %
Vodafone I	51	3.4 %	(34.4) %	Hind. Unil	1,699	(4.6) %	25.7 %
Ashok Leyl	133	3.4 %	(9.9) %	DLF	212	(3.8) %	5.7 %
Eicher Mot	28,886	2.9 %	2.1 %	Piramal En	3,079	(3.8) %	24.6 %
Emami	579	2.5 %	6.0 %	Power Grid	195	(3.5) %	(0.2) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (2Q)	04-09-2018	01:30	AUD	-	-
Net Exports of Gross Domestic Product (2Q)	04-09-2018	01:30	AUD	-	0.3
RBA Cash Rate Target (SEP 4)	04-09-2018	04:30	AUD	-	0.015
RBA Governor Lowe speaks in Perth	04-09-2018	09:30	AUD	-	-
AiG Performance of Service Index (AUG)	04-09-2018	22:30	AUD	-	53.6
CBA Australia PMI Composite (AUG)	04-09-2018	23:00	AUD	-	52.3
CBA Australia PMI Services (AUG)	04-09-2018	23:00	AUD	-	52.3
MLI Leading Indicator (MoM) (JUL)	04-09-2018	12:30	CAD	-	0.002
RBC Canadian Manufacturing PMI (AUG)	04-09-2018	13:30	CAD	-	56.9
Consumer Price Index (MoM) (AUG)	04-09-2018	07:15	CHF	-	(0.002)
Consumer Price Index (YoY) (AUG)	04-09-2018	07:15	CHF	-	0.012
Consumer Price Index Core (YoY) (AUG)	04-09-2018	07:15	CHF	-	0.005
Consumer Price Index EU Harmonized (MoM) (AUG)	04-09-2018	07:15	CHF	-	0.004
Consumer Price Index EU Harmonized (YoY) (AUG)	04-09-2018	07:15	CHF	-	0.012
Euro-Zone Producer Price Index (MoM) (JUL)	04-09-2018	09:00	EUR	-	0.004
Euro-Zone Producer Price Index (YoY) (JUL)	04-09-2018	09:00	EUR	-	0.036
Markit/CIPS UK Construction PMI (AUG)	04-09-2018	08:30	GBP	-	55.8
BOE's Carney, Haldane, Tenreyro, and Saunders Speak in London	04-09-2018	12:15	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	04-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	04-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	04-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	04-09-2018	01:10	JPY	-	-
QV House Prices (YoY) (AUG)	04-09-2018	17:00	NZD	-	0.051
ANZ Job Advertisements (MoM) (AUG)	04-09-2018	22:00	NZD	-	0.031
Volume of All Buildings SA (QoQ) (2Q)	04-09-2018	22:45	NZD	-	(0.009)
Markit US Manufacturing PMI (AUG F)	04-09-2018	13:45	USD	-	-
Construction Spending (MoM) (JUL)	04-09-2018	14:00	USD	-	(0.011)
ISM Employment (AUG)	04-09-2018	14:00	USD	-	56.5
ISM Manufacturing (AUG)	04-09-2018	14:00	USD	-	58.1



ISM New Orders (AUG)	04-09-2018	14:00	USD	-	60.2
ISM Prices Paid (AUG)	04-09-2018	14:00	USD	-	73.2
U.S. to Sell 3-Month Bills	04-09-2018	15:30	USD	-	-
U.S. to Sell 4-Week Bills	04-09-2018	15:30	USD	-	-
U.S. to Sell 6-Month Bills	04-09-2018	15:30	USD	-	-

..... End of Report .....

