



INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,800	0.0 %	(7.4) %
BSE SENSEX	36,563	(2.1) %	(6.0) %
CNX BANK	26,756	(0.3) %	(11.8) %
CNX MIDCAP	15,347	(0.2) %	(16.3) %
CNX SMALLCAP	5,333	(0.2) %	(20.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,118	(1.1) %	12.0 %
S&P 500	2,906	(0.7) %	15.9 %
FTSE 100	7,268	(0.2) %	7.9 %
HANG SENG	25,528	(0.4) %	1.6 %
NIKKEI	20,625	0.0 %	5.4 %
SHANGHAI COMPOSITE	2,930	0.2 %	18.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.85	0.2 %	3.5 %
EUR/USD	1.10	(0.9) %	(4.2) %
GBP/USD	1.21	(0.8) %	(5.1) %
USD/JPY	106.24	(0.0) %	(3.1) %
USD/AUD	1.49	0.2 %	4.7 %
USD/SGD	1.39	0.2 %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(0.1) %	17.8 %
Gold(INR/10g)	39,007	1.6 %	23.7 %
Gold Comex(USD/oz)	1,538	0.0 %	19.2 %
SILVER(INR/1Kg)	47,977	2.8 %	25.4 %
Aluminium(USD/MT)	1,717	0.0 %	(7.6) %
Copper(USD/MT)	5,610	(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 manufacturing activity contracted for the first time in three years in the month of August, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its purchasing manager's index fell to 49.1 in August after dipping to 51.2 in July, with a reading below 50 indicating a contraction. The US Commerce Department said construction spending rose by 0.1% to an annual rate of \$1.289 trillion in July after sliding by 0.7% to a revised June rate of \$1.288 trillion. Eurozone producer price inflation eased to the lowest since late 2016 in July largely reflecting weak energy prices, data from Eurostat showed Tuesday. Producer prices grew 0.2% annually in July following a 0.7% rise in June. The IHS Markit/CIPS UK Construction Total Activity Index fell to 45 from 45.3 in July. Australia's central bank left its key interest rate unchanged at a record low of 1% for the second straight meeting.

Global Equities: US traders returned following the long holiday weekend and pushed markets lower after good gains last week. Weak economic data and trade worries also weighed.

Indian Economy: IHS Markit India Manufacturing PMI declines to its lowest mark since May 2018 at 51.4 in August from 52.5 in July. Although economic growth in the Indian manufacturing industry was sustained in August, most survey indicators fell since July to signal a widespread loss of momentum. According to the kharif sowing data released by the Agriculture Ministry, plantings have covered nearly 1,010 lakh hectares (lh) on 30 August 2019, compared with 1,027 lh in the corresponding period last year, marking a drop of 1.72% as a recovery in acreage is recent weeks continued on a good showing by the monsoon. Government raised the price of sugarcane-extracted ethanol used for blending in petrol by up to Rs 1.84 per litre as it looked to cut oil import bill by \$1 billion annually through its greater use in auto fuels. RBI's task force recommends moves to ease credit markets in India.

Equity Markets: The local market ended steeply lower on Tuesday, after data last week showed India's gross domestic product (GDP) growth moderated to 5% in Q1 June 2019. The barometer index, the S&P BSE Sensex, fell 769.88 points or 2.06% to 36,562.91. The Nifty 50 index fell 225.35 points or 2.04% to 10,797.90. The Nifty opened below 11,000 mark and extended losses as the session progressed and saw hefty selling in late trades.

Corporate News: IT counters could see some buying as the Indian Rupee plunged around 99 paise to a fresh nine month low of 72.39 per US dollar. Ashok Leyland said its entire range of heavy duty trucks has been upgraded to meet BS-VI emission norms, which come into force from April 1, 2020. TVS Motor Co on Tuesday reported a 15.37% drop in total sales in August at 2,90,455 units. Gross bad loans of banks are expected to come down marginally to Rs 9.1 lakh crore by the end of the current financial year, according to a report. Indian banks' gross non-performing assets (NPAs) stood at Rs 9.4 lakh crore as on March 31, 2019, said a joint study by Assocham-Crisil.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	80.1	(109.9)	3.5
MF(INR cr)	1,414.8	870.3	381.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,024	30,024	34,440
F&O(INR cr)	931,078	931,078	1,287,250

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.0	19.0	15.6
NSE VIX	18.1	18.1	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,824	(2.2) %	(11.5) %	Energy	13,972	(2.9) %	(15.5) %
IT	15,985	(0.2) %	0.9 %	Pharma	7,976	(1.2) %	(14.9) %
Metals	2,219	(3.1) %	(28.5) %	Finance	12,135	(2.3) %	(2.9) %
Auto	6,898	(1.6) %	(18.0) %	PSU	2,354	(4.9) %	(30.5) %
FMCG	28,767	(1.7) %	(4.7) %	Real Estate	261	(2.3) %	(2.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HDFC AMC	2,652	3.9 %	70.5 %	ICICI Lomb	1,190	(5.4) %	17.2 %
NHPC Ltd	24	1.7 %	(5.6) %	Bosch	13,789	(4.7) %	(23.8) %
Cadila Hea	229	1.6 %	(33.5) %	Vodafone I	5	(4.7) %	(71.3) %
Tech Mahin	705	1.6 %	(10.3) %	ACC	1,451	(4.5) %	(11.9) %
Ashok Leyl	65	1.4 %	(27.7) %	Tata Motor	51	(4.5) %	(44.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Gross Domestic Product (QoQ) (2Q)	04-09-2019	1:30	AUD	-	0.004
Gross Domestic Product (YoY) (2Q)	04-09-2019	1:30	AUD	-	0.018
International Merchandise Trade (Canadian dollar) (JUL)	04-09-2019	12:30	CAD	-	-
Labor Productivity (QoQ) (2Q)	04-09-2019	12:30	CAD	-	0.003
Bank of Canada Rate Decision (SEP 4)	04-09-2019	14:00	CAD	-	0.018
Caixin China PMI Composite (AUG)	04-09-2019	1:45	CNY	-	50.9
Caixin China PMI Services (AUG)	04-09-2019	1:45	CNY	-	51.6
ECB's Lane Speaks in London	04-09-2019	11:00	EUR	-	-
Markit Italy Composite PMI (AUG)	04-09-2019	7:45	EUR	-	51
Markit Italy Services PMI (AUG)	04-09-2019	7:45	EUR	-	51.7
Markit France Composite PMI (AUG F)	04-09-2019	7:50	EUR	-	52.7
Markit France Services PMI (AUG F)	04-09-2019	7:50	EUR	-	53.3
Markit Germany Services PMI (AUG F)	04-09-2019	7:55	EUR	-	54.4
Markit/BME Germany Composite PMI (AUG F)	04-09-2019	7:55	EUR	-	51.4
Markit Eurozone Composite PMI (AUG F)	04-09-2019	8:00	EUR	-	51.8
Markit Eurozone Services PMI (AUG F)	04-09-2019	8:00	EUR	-	53.4
Euro-Zone Retail Sales (MoM) (JUL)	04-09-2019	9:00	EUR	-	0.011
Euro-Zone Retail Sales (YoY) (JUL)	04-09-2019	9:00	EUR	-	0.026
Markit/CIPS UK Composite PMI (AUG)	04-09-2019	8:30	GBP	-	50.7
Markit/CIPS UK Services PMI (AUG)	04-09-2019	8:30	GBP	-	51.4
Official Reserves (Changes) (AUG)	04-09-2019	8:30	GBP	-	-
Jibun Bank Japan PMI Composite (AUG F)	04-09-2019	0:30	JPY	-	51.7
Jibun Bank Japan PMI Services (AUG F)	04-09-2019	0:30	JPY	-	53.4
BOJ Goshi Kataoka speaks in Hakodate	04-09-2019	1:30	JPY	-	-
Foreign Buying Japan Bonds (AUG 30)	04-09-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (AUG 30)	04-09-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (AUG 30)	04-09-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 30)	04-09-2019	23:50	JPY	-	-
ANZ Commodities Price (AUG)	04-09-2019	1:00	NZD	-	(0.014)



Volume of All Buildings SA (QoQ) (2Q)	04-09-2019	22:45	NZD	-	0.062
MBA Mortgage Applications (AUG 30)	04-09-2019	11:00	USD	-	(0.062)
Trade Balance (JUL)	04-09-2019	12:30	USD	-	-
Fed's Williams Speaks in New York	04-09-2019	13:25	USD	-	-
Fed's Bowman, Bullard Address 'Fed Listens' Event in St. Louis	04-09-2019	16:30	USD	-	-
Fed's Kashkari Speaks in Townhall Event in Minneapolis	04-09-2019	17:00	USD	-	-
U.S. Federal Reserve Releases Beige Book	04-09-2019	18:00	USD	-	-
Fed's Evans Speaks at Event on North American Trade	04-09-2019	19:15	USD	-	-

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