



04 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,755	(1.0) %	5.3 %
BSE SENSEX	35,976	(1.5) %	7.7 %
CNX BANK	24,735	(1.3) %	1.7 %
CNX MIDCAP	16,830	(1.5) %	(11.9) %
CNX SMALLCAP	6,105	(1.5) %	(23.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,828	0.2 %	8.1 %
S&P 500	2,926	0.1 %	8.5 %
FTSE 100	7,510	0.5 %	(1.8) %
HANG SENG	27,091	(0.1) %	(11.2) %
NIKKEI	24,111	(0.7) %	2.6 %
SHANGHAI COMPOSITE	2,821	1.1 %	(15.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.34	1.2 %	15.2 %
EUR/USD	1.15	(1.1) %	(4.5) %
GBP/USD	1.29	(0.8) %	(4.3) %
USD/JPY	114.31	0.5 %	1.4 %
USD/AUD	1.41	1.9 %	10.3 %
USD/SGD	1.38	1.1 %	3.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	1.6 %	26.6 %
Gold(INR/10g)	30,997	1.6 %	5.6 %
Gold Comex(USD/oz)	1,200	(0.9) %	(8.3) %
SILVER(INR/1Kg)	38,448	1.8 %	(0.4) %
Aluminium(USD/MT)	2,167	4.2 %	(4.0) %
Copper(USD/MT)	6,275	0.0 %	(12.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.1 %	0.7 %

Global Economy: Eurozone private sector expanded at the slowest pace in four months in September on weak manufacturing activity, survey data from IHS Markit showed Wednesday. The final composite output index dropped to 54.1 in September from 54.5 in August and slightly below the flash estimate of 54.2. September's increase in activity marked the sixty-third successive month of growth. Eurozone retail sales decreased 0.2% month-on-month in August, following a 0.6% drop last month, reflecting the weakness in food turnover, figures from Eurostat revealed. This was the second consecutive fall in sales. UK service sector activity maintained strong growth momentum in September, survey data from IHS Markit showed Wednesday. The IHS Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index dropped to 53.9 in September from 54.3 in August. The service sector in Australia continued to expand in September. The latest survey from the Australian Industry Group revealed a Performance of Service Index score of 52.5, up from 52.2 in August.

Global Equities: European markets edged up as Italian worries faded somewhat on reports that the government will rein in its spending plans.

Indian Economy: The combined Index of Eight Core Industries stands at 128.1 in August, 2018, which was 4.2% higher as compared to the index of August, 2017. Its cumulative growth during April to August, 2018-19 was 5.5%. The Eight Core Industries comprise 40.27% of the weight of items included in the Index of Industrial Production (IIP). The government has approved a proposal to hike the minimum support price (MSP) for Rabi crops, according to media reports.

Equity Markets: Local stocks remains in a bearish mode as a late correction triggered heavy losses for the benchmark indices. The the Sensex ended below 36,000 and Nifty fell under 10,900 levels amid weakening rupee and soaring crude oil prices.

Corporate News: Larsen & Toubro has gained the contract for the construction of Terminal 2 at the Kempegowda International airport in Bengaluru. The EPC order is worth Rs 3035 crore. Infosys has been assigned A3 local-currency senior unsecured credit rating with a Stable Outlook by Moody's Investor Service (Moody's). Given Infosys' international revenue base and strong financial profile, Moody's has rated Infosys two notches higher than the Government of India (Baa2 stable). Zee Entertainment has forayed into 190 countries with its digital entertainment platform, ZEE5, as it looks to grow its OTT subscriber base, especially the South Asian diaspora, around the world. IT stocks could be in continued focus as the Rupee endured further losses. The INR closed at a record closing low of 73.34 per dollar on Wednesday on the back of strong demand for US dollar after testing a low of 73.41 in intraday moves. TVS Motor Company announced that their new 160cc motorcycle offering TVS Apache RTR 160 4V has crossed the 1 lakh sales mark. Launched in March 2018, the motorcycle has achieved the milestone in a span of six months.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(220.9)	(220.9)	(35.1)
MF(INR cr)	3,456.1	633.4	403.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	42,505	42,331	35,052
F&O(INR cr)	1,176,211	975,267	955,588

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.1	12.1	14.1
NSE VIX	18.1	17.5	13.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,070	(1.2) %	3.0 %	Energy	15,371	(1.1) %	15.6 %
IT	15,910	(1.9) %	25.2 %	Pharma	9,951	(0.8) %	15.4 %
Metals	3,592	1.8 %	1.5 %	Finance	10,589	(1.1) %	3.2 %
Auto	9,375	(2.9) %	(15.2) %	PSU	2,786	(0.5) %	(2.4) %
FMCG	29,498	(1.4) %	11.3 %	Real Estate	216	(0.0) %	(27.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	213	5.9 %	(30.5) %	M & M	792	(6.6) %	5.8 %
Hindalco I	254	4.5 %	20.1 %	Eicher Mot	23,236	(6.1) %	(17.9) %
Indiabulls	944	4.2 %	(24.1) %	Bharti Inf	252	(5.9) %	(25.5) %
Siemens	980	4.1 %	(11.0) %	Shriram Tr	1,078	(5.4) %	(26.6) %
SBI Life I	542	4.0 %	(20.7) %	Vodafone I	37	(5.3) %	(52.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (AUG)	04-10-2018	01:30	AUD	-	-
AiG Performance of Construction Index (SEP)	04-10-2018	22:30	AUD	-	51.8
Ivey Purchasing Managers Index s.a. (SEP)	04-10-2018	14:00	CAD	-	61.9
Markit Germany Construction PMI (SEP)	04-10-2018	07:30	EUR	-	51.5
ECB Vice President Luis de Guindos Speaks in Madrid	04-10-2018	23:00	EUR	-	-
New Car Registrations (YoY) (SEP)	04-10-2018	08:00	GBP	-	0.231
Overall Household Spending (YoY) (AUG)	04-10-2018	23:30	JPY	-	0.001
Consumer Confidence Index (SEP)	04-10-2018	13:00	MXN	-	103.9
Overnight Rate (OCT 4)	04-10-2018	18:00	MXN	-	0.0775
Challenger Job Cuts (YoY) (SEP)	04-10-2018	11:30	USD	-	0.137
Continuing Claims (SEP 22)	04-10-2018	12:30	USD	-	-
Initial Jobless Claims (SEP 29)	04-10-2018	12:30	USD	-	-
Fed's Quarles Speaks at Community Banking Conference	04-10-2018	13:15	USD	-	-
Cap Goods Orders Nondef Ex Air (AUG F)	04-10-2018	14:00	USD	-	(0.005)
Cap Goods Ship Nondef Ex Air (AUG F)	04-10-2018	14:00	USD	-	0.001
Durable Goods Orders (AUG F)	04-10-2018	14:00	USD	-	0.045
Durables Ex Transportation (AUG F)	04-10-2018	14:00	USD	-	0.001
Factory Orders (AUG)	04-10-2018	14:00	USD	-	(0.008)
Factory Orders Ex Trans (AUG)	04-10-2018	14:00	USD	-	0.002
EIA Natural Gas Storage Change (SEP 28)	04-10-2018	14:30	USD	-	46
EIA Working Natural Gas Implied Flow (SEP 28)	04-10-2018	14:30	USD	-	46

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