



04 Oct.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,388	0.7 %	(2.4) %
BSE SENSEX	38,107	(0.5) %	(1.2) %
CNX BANK	28,682	0.9 %	(5.4) %
CNX MIDCAP	15,790	0.5 %	(13.9) %
CNX SMALLCAP	5,509	0.5 %	(18.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,201	0.5 %	12.3 %
S&P 500	2,911	0.8 %	16.1 %
FTSE 100	7,078	(0.6) %	5.1 %
HANG SENG	26,110	0.3 %	3.9 %
NIKKEI	21,342	(2.0) %	9.1 %
SHANGHAI COMPOSITE	2,905	(0.9) %	17.8 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.96	0.9 %	2.2 %
EUR/USD	1.09	0.0 %	(4.5) %
GBP/USD	1.23	0.0 %	(3.6) %
USD/JPY	107.49	(0.5) %	(2.0) %
USD/AUD	1.49	0.9 %	5.0 %
USD/SGD	1.38	0.2 %	1.5 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.2) %	13.1 %
Gold(INR/10g)	37,919	1.9 %	20.3 %
Gold Comex(USD/oz)	1,515	0.5 %	17.3 %
SILVER(INR/1Kg)	45,135	2.3 %	18.0 %
Aluminium(USD/MT)	1,697	0.0 %	(8.7) %
Copper(USD/MT)	5,626	(0.1) %	(3.6) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.1) %	(1.1) %

**Global Economy:** The ISM said its US non-manufacturing index dropped to 52.6 in September - around three year low after rising to 56.4 in August. Commerce Department said factory orders edged down by 0.1% in August after surging up 1.4% in July. Eurozone private sector expanded at the slowest pace in more than six years in September. The final composite output index fell to 50.1 in September from 51.9 in August, sliding even below the flash estimate of 50.4. Manufacturers logged the sharpest fall in output for nearly seven years in September. The services Purchasing Managers' Index came in at 51.6, down from 53.5 in the previous month. FAO Food Price Index (FFPI) averaged around 170 points in September 2019, unchanged from August but 3.3% higher than in the corresponding period last year. The services sector in Japan continued to expand in September, albeit at a slower rate, the latest survey from Jibun Bank revealed with a PMI score of 52.8, down from the 22-month high of 53.3 in August. The survey also showed that Japan's composite index came in at 51.5, down from 51.9 in August. Australia's trade surplus decreased in August as exports were down on weak commodity prices. Exports fell by seasonally adjusted 3 percent to A\$40.98 billion in August while imports dropped slightly to A\$35.05 billion. The trade surplus narrowed to A\$5.92 billion from A\$7.25 billion a month ago. Commonwealth Bank composite output index for Australia rose to 52.0 in September from 49.3 in August. The services sector returned to growth supported by a strengthening sales trend though manufacturing output continued to drag overall private sector growth.

**Global Equities:** US stocks edged up after a heavy slide in early moves.

**Indian Economy:** An analysis of sectoral data indicates that there has been pick -up in credit flows to NBFCs and MSME in FY20, noted the State Bank Of India in its latest edition of Ecowrap. Credit to NBFCs has declined in April but thereafter has picked up and was Rs 43600 crore in Aug'19. Credit to MSME sector expanded by Rs 900 crores in August after a significant contraction in July of Rs 15,300 crores. Government of India, in consultation with the Reserve Bank of India, has decided to issue Sovereign Gold Bonds. The Sovereign Gold Bonds will be issued in six tranches from October 2019 to March 2020. SEBI has allowed mutual funds to invest in unlisted non-convertible debentures (NCDs) up to a maximum of 10% of the debt portfolio of a scheme in a phased manner. Investment in debt instruments, having credit enhancements backed by equity shares directly or indirectly, shall have a minimum cover of four times considering the market value of such shares.

**Equity Markets:** Key benchmark indices extended losses for fourth consecutive session on Thursday, dragged by weak global markets. Metal shares tumbled on fears of weak global growth. The barometer index, the S&P BSE Sensex, fell 198.54 points or 0.52% to 38,106.87. The Nifty 50 index fell 46.80 points or 0.41% to 11,313.10.

**Corporate News:** IT counters can see selling pressure on rising Indian Rupee. INR gained as the deep slide in global crude oil prices supported the local currency. INR added 20 basis points to close at 70.87 per US dollar yesterday. Interest rate sensitive auto, banking and realty stocks will be watched ahead of the outcome of the Reserve Bank of India's (RBI) fourth bi-monthly monetary policy review meeting today.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(216.7)	(216.7)	8.9
MF(INR cr)	839.3	839.3	415.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	39,642	44,419	35,514
F&O(INR cr)	2,791,988	2,323,290	1,342,813

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.1	19.8	15.6
NSE VIX	17.7	17.2	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	28,414	(1.1) %	(6.3) %	Energy	15,593	1.3 %	(5.7) %
IT	15,278	(0.1) %	(3.6) %	Pharma	7,462	(0.1) %	(20.4) %
Metals	2,327	(2.9) %	(25.0) %	Finance	12,848	(1.1) %	2.8 %
Auto	7,494	0.4 %	(10.9) %	PSU	2,209	0.1 %	(34.7) %
FMCG	30,791	(0.0) %	2.0 %	Real Estate	251	1.2 %	(6.0) %

### 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>
Yes Bank	43	32.8 %	(84.6) %	Piramal En	1,575	(5.6) %	(41.5) %
Zee Entert	252	7.9 %	(41.7) %	Vodafone I	5	(5.6) %	(71.3) %
B P C L	532	7.6 %	35.6 %	Vedanta	144	(4.6) %	(23.6) %
Tata Motor	122	6.2 %	(34.7) %	Motherson	99	(4.5) %	(35.3) %
Tata Motor	55	6.0 %	(40.8) %	Coal India	187	(3.8) %	(21.0) %

### 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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