



05 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,777	0.1 %	5.5 %
BSE SENSEX	35,645	0.8 %	7.2 %
CNX BANK	26,482	0.2 %	8.9 %
CNX MIDCAP	18,249	(0.0) %	(4.4) %
CNX SMALLCAP	7,216	0.1 %	(9.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,175	(0.5) %	(2.6) %
S&P 500	2,713	(0.5) %	0.6 %
FTSE 100	7,573	(0.3) %	(1.0) %
HANG SENG	28,242	(1.1) %	(7.5) %
NIKKEI	21,717	(0.3) %	(7.6) %
SHANGHAI COMPOSITE	2,759	(1.0) %	(17.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.74	(0.1) %	8.0 %
EUR/USD	1.17	0.2 %	(2.9) %
GBP/USD	1.32	0.7 %	(2.1) %
USD/JPY	110.45	(0.4) %	(2.0) %
USD/AUD	1.35	(0.6) %	5.9 %
USD/SGD	1.37	(0.5) %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.3 %	22.8 %
Gold(INR/10g)	30,510	0.8 %	3.9 %
Gold Comex(USD/oz)	1,259	1.5 %	(3.8) %
SILVER(INR/1Kg)	39,276	0.9 %	1.7 %
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: China's private sector expanded at the fastest pace in four months in June on stronger increase across manufacturing and services, data from IHS Markit showed Wednesday. The Caixin composite output index rose to 53.0 in June from 52.3 in May. A score above 50 indicates expansion in the sector. Both manufacturing and services expanded further in June. Growth in manufacturing production rose to a four-month record, but remained moderate and weaker than that seen in the service sector. UK service sector activity improved to 55.1 in June from 54.0 in May, at the fastest pace in eight months driven by strong growth in new work, survey data from IHS Markit showed. The score has remained above the 50.0 no-change mark for the twenty-third consecutive month. Australia retail sales climbed a seasonally adjusted 0.4% on month in May, coming in at A\$26.673 billion, following the upwardly revised 0.5% gain in April (originally 0.4%).

Global Equities: European shares saw a choppy trade following continued global trade worries. US markets were shut for Independence Day Holiday.

Indian Economy: As per the latest update from official sources, the Union cabinet has approved the proposal of increasing the Minimum Support Price (MSP) for Kharif crops by around 1.5 times the cost. According to media reports, the MSP for paddy has been increased by around Rs 250 per quintal. Maize MSP will be increased by 19.3%. Oil seeds like soybeans, sesame and groundnut are to get an MSP increased by 11.4%, 17.9% and 9.9% respectively. In pulses, Moong will get a massive 25.1% increase in MSP. While Tur and Urad dal will be given an MSP hike of 4.1% and 3.7% respectively.

Equity Markets: Local stocks extended gains. Key benchmark indices settled with modest improvement led by index heavyweights HDFC, HDFC Bank and Reliance Industries. The barometer index, the S&P BSE Sensex, rose 266.80 points or 0.75% to settle at 35,645.40. The Nifty 50 index rose 70 points or 0.65% to settle at 10,769.90. Shares from auto and pharma sectors gained. Upbeat June services PMI data boosted sentiment on the domestic bourses. After opening higher, indices reversed trend and hit fresh intraday low in early trade. Indices bounced back in mid-morning trade and hit fresh intraday high in mid-afternoon trade.

Corporate News: Tata Consultancy Services has been positioned as a Leader in Everest Group's "Enterprise QA Services PEAK™ Assessment 2018". Yes Bank announced that it has received the final regulatory approval (Certificate of Registration) from the Securities & Exchange Board of India (SEBI) to commence its Mutual Fund business. India's Nikkei Services Purchasing Managers' Index climbed to 52.6 in June from 49.6 in May, survey data from IHS Markit showed Wednesday. Any score above 50 suggests expansion, while a reading below 50 indicates contraction in the sector. The services sector activity expanded at the fastest pace in a year in June, following a marginal contraction in the previous month. The Nikkei Composite Output Index, which covers both manufacturing and services, rose to 53.3 in June from 50.4 in the prior month.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(143.7)	(60.3)	(44.1)
MF(INR cr)	2,352.5	424.2	494.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,990	28,580	32,842
F&O(INR cr)	872,090	669,994	829,596

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.1	15.9	15.3
NSE VIX	12.7	13.0	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,434	0.9 %	8.7 %	Energy	13,373	0.7 %	0.6 %
IT	14,126	(0.7) %	11.2 %	Pharma	9,400	0.8 %	9.0 %
Metals	3,370	0.1 %	(4.8) %	Finance	11,019	1.0 %	7.4 %
Auto	10,914	1.3 %	(1.3) %	PSU	2,766	(0.2) %	(3.1) %
FMCG	29,108	0.5 %	9.8 %	Real Estate	270	0.5 %	(9.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bajaj Auto	2,979	4.1 %	6.1 %	Shriram Tr	1,145	(11.7) %	(22.0) %
Lupin	934	3.4 %	20.2 %	Idea Cellu	55	(2.9) %	(29.1) %
Bharti Inf	300	2.7 %	(11.3) %	Bharat Ele	104	(2.9) %	(27.9) %
Maruti Suz	9,221	2.7 %	2.4 %	H P C L	252	(2.5) %	(26.8) %
Bajaj Fins	6,033	2.5 %	14.5 %	Grasim Ind	965	(2.1) %	(11.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (JUN)	05-07-2018	22:30	AUD	-	54
Consumer Price Index (MoM) (JUN)	05-07-2018	7:15	CHF	-	0.004
Consumer Price Index (YoY) (JUN)	05-07-2018	7:15	CHF	-	0.01
CPI EU Harmonized (MoM) (JUN)	05-07-2018	7:15	CHF	-	0.004
CPI EU Harmonized (YoY) (JUN)	05-07-2018	7:15	CHF	-	0.01
ECB's Mersch, Nowotny, Nouy at Austrian C.Bank Conference	05-07-2018	10:30	EUR	-	-
German Factory Orders (MoM) (MAY)	05-07-2018	6:00	EUR	-	(0.025)
German Factory Orders n.s.a. (YoY) (MAY)	05-07-2018	6:00	EUR	-	(0.001)
Markit Germany Construction PMI (JUN)	05-07-2018	7:30	EUR	-	53.9
Markit Eurozone Retail PMI (JUN)	05-07-2018	8:10	EUR	-	51.7
Markit France Retail PMI (JUN)	05-07-2018	8:10	EUR	-	50.7
Markit Germany Retail PMI (JUN)	05-07-2018	8:10	EUR	-	55.5
Markit Italy Retail PMI (JUN)	05-07-2018	8:10	EUR	-	47.3
BOE Governor Carney Speaks in Newcastle	05-07-2018	10:00	GBP	-	-
New Car Registrations (YoY) (JUN)	05-07-2018	8:00	GBP	-	0.034
BOJ Masai speaks in Matsumoro	05-07-2018	1:30	JPY	-	-
Overall Household Spending (YoY) (MAY)	05-07-2018	23:30	JPY	-	(0.013)
Challenger Job Cuts (YoY) (JUN)	05-07-2018	11:30	USD	-	(0.048)
ADP Employment Change (JUN)	05-07-2018	12:15	USD	-	-
Continuing Claims (JUN 23)	05-07-2018	12:30	USD	-	-
Initial Jobless Claims (JUN 30)	05-07-2018	12:30	USD	-	-
Markit US Composite PMI (JUN F)	05-07-2018	13:45	USD	-	56
Markit US Services PMI (JUN F)	05-07-2018	13:45	USD	-	56.5
ISM Non-Manufacturing/Services Composite (JUN)	05-07-2018	14:00	USD	-	58.6
DOE Cushing OK Crude Inventory (JUN 29)	05-07-2018	15:00	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 29)	05-07-2018	15:00	USD	-	-
DOE U.S. Distillate Inventory (JUN 29)	05-07-2018	15:00	USD	-	-
DOE U.S. Gasoline Inventories (JUN 29)	05-07-2018	15:00	USD	-	-
FMCG Monthly Minutes (JUN 12)	05-07-2018	18:00	USD	-	-



..... End of Report

