



05 Aug.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,997	0.2 %	(5.8) %
BSE SENSEX	37,118	0.3 %	(4.5) %
CNX BANK	28,205	(0.6) %	(7.0) %
CNX MIDCAP	15,709	(0.3) %	(14.3) %
CNX SMALLCAP	5,438	(0.3) %	(19.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,485	(0.4) %	13.5 %
S&P 500	2,932	(0.7) %	17.0 %
FTSE 100	7,407	(2.3) %	10.0 %
HANG SENG	26,919	(2.4) %	7.1 %
NIKKEI	21,087	(2.1) %	7.8 %
SHANGHAI COMPOSITE	2,868	(1.4) %	16.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.46	0.7 %	0.0 %
EUR/USD	1.11	0.4 %	(3.1) %
GBP/USD	1.21	0.1 %	(4.8) %
USD/JPY	106.84	(1.5) %	(2.5) %
USD/AUD	1.47	0.6 %	3.5 %
USD/SGD	1.38	0.1 %	0.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	0.2 %	18.6 %
Gold(INR/10g)	35,341	2.3 %	12.1 %
Gold Comex(USD/oz)	1,440	0.5 %	11.5 %
SILVER(INR/1Kg)	40,746	1.6 %	6.5 %
Aluminium(USD/MT)	1,749	(0.5) %	(5.9) %
Copper(USD/MT)	5,769	(1.8) %	(1.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.1) %	(0.8) %

**Global Economy:** The US job growth slowed in the month of July, according to latest data from the US Labor Department. The widely tracked US non-farm payroll employment rose by 164,000 jobs in July after jumping by a downwardly revised 193,000 jobs in June. Previous month's data had showed a growth of 224,000 jobs in June. The unemployment rate held at 3.7% in July, unchanged from June as the 370,000-person jump in the size of the labor force was offset by the 283,000-person increase in the household survey measure of employment. The average hourly employee earnings rose by another \$0.08 to \$27.98 in June, up 3.2% compared to the same month a year ago. Eurozone retail sales expanded 1.1% month-on-month in June, reversing a 0.6% fall in May, Eurostat reported Friday. On a yearly basis, retail sales growth accelerated to 2.6% from 1% in May. Australia's retail sales advanced 0.4% month-on-month in June, following a 0.1% rise in May, data from the Australian Bureau of Statistics showed Friday. This was the fastest growth since February.

**Global Equities:** Risky assets continued to suffer on broad macro concerns. US stocks saw steep losses. Tech-heavy Nasdaq tumbled 1.3%, Dow slipped 0.4% and S&P 500 fell 0.7%.

**Indian Economy:** Indian economy slipped to the seventh place in the global GDP rankings of 2018, according to the latest data compiled by the World Bank. Indian economy, with a Gross Domestic Product (GDP) of \$2.7 trillion in 2018, trailed behind the UK and France which were at \$2.8 trillion says World Bank. Value of Immediate Payment Service or IMPS IMPS transactions hits all-time high of Rs 1.82-lakh crore in July. Area sown under kharif crops is 788.5 lakh hectares (lh) as on August 2nd, about 6.6% lower than 844 lh covered in the corresponding week in the previous kharif season, according to data released by the Agriculture Ministry. India has laid out a big list of demands for market access in both goods and services in the on-going negotiations for the Regional Comprehensive Economic Partnership (RCEP) pact. Total gross GST revenue collected in the month of July, 2019 is Rs1,02,083 crore. Total number of GSTR 3B Returns filed for the month of June up to 31st July, 2019 is 75.79 lakh.

**Equity Markets:** Key equity benchmarks settled with decent gains on Friday, reversing steep losses in morning trade. Global shares were under pressure on US President Donald Trump's decision to impose new tariffs on Chinese goods. Domestic barometers bounced back in afternoon trade, with the Nifty briefly regaining 11,000 mark. Media reports suggested that Prime Minister Office (PMO) and finance ministry's top bureaucrats were in talks over foreign portfolio investor (FPI) surcharge issue.

**Corporate News:** SBI, the biggest lender in India recorded a 176% quarter-on-quarter increase in net profit of Rs 838.40 cr in June quarter, on the back of better asset quality and decline in loan provisions. Provision Coverage Ratio improved significantly by 1,009 bps from 69.25 per cent as on June 2018 to 79.34 per cent as on June 2019. FMCG major Nestle India on Friday reported an increase of 10.83 per cent in net profit to Rs 437.84 crore for the second quarter of current fiscal, led by sales and volume growth. Sun Pharma said it is discontinuing operations at two clinical pharmacology units in Vadodara (Gujarat) to bring in efficiencies in cost and processes. ITC Ltd reported a 13%, year-on-year, jump in net profit to Rs 3,174 crore in the first quarter of this fiscal.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(169.0)	(169.0)	28.5
MF(INR cr)	93,566.0	93,566.0	1,374.4

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	40,610	38,077	34,158
F&O(INR cr)	1,142,377	1,971,000	1,251,848

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.6	17.7	14.8
NSE VIX	15.2	14.9	17.9

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,205	(0.6) %	(7.0) %	Energy	14,434	(1.1) %	(12.7) %
IT	15,422	0.6 %	(2.6) %	Pharma	7,868	(0.1) %	(16.1) %
Metals	2,459	(1.9) %	(20.7) %	Finance	12,501	0.1 %	0.0 %
Auto	6,934	1.1 %	(17.6) %	PSU	2,656	(1.1) %	(21.5) %
FMCG	28,931	0.0 %	(4.2) %	Real Estate	263	(0.7) %	(1.7) %

### 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>
New India	120	7.8 %	(36.3) %	Ashok Leyl	64	(6.5) %	(28.7) %
Bharti Air	344	6.1 %	9.8 %	Indiabulls	490	(6.2) %	(42.2) %
Bajaj Hold	3,512	4.7 %	4.8 %	Vodafone I	6	(4.5) %	(64.2) %
General In	194	3.9 %	(21.3) %	H P C L	253	(3.8) %	(10.7) %
Pidilite I	1,257	3.7 %	0.3 %	Bandhan Ba	465	(3.2) %	(12.3) %

### 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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