



05 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,520	0.0 %	12.8 %
BSE SENSEX	38,158	(0.4) %	15.0 %
CNX BANK	27,431	0.0 %	12.8 %
CNX MIDCAP	19,327	0.0 %	1.2 %
CNX SMALLCAP	7,454	0.0 %	(6.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,952	(0.1) %	4.5 %
S&P 500	2,897	(0.2) %	7.5 %
FTSE 100	7,458	(0.6) %	(2.5) %
HANG SENG	27,973	0.9 %	(8.3) %
NIKKEI	22,697	(0.1) %	(3.4) %
SHANGHAI COMPOSITE	2,751	1.1 %	(17.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.56	0.8 %	12.4 %
EUR/USD	1.16	0.0 %	(3.4) %
GBP/USD	1.29	(0.7) %	(4.8) %
USD/JPY	111.56	0.5 %	(1.0) %
USD/AUD	1.39	(0.4) %	8.4 %
USD/SGD	1.37	0.2 %	3.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	(0.6) %	15.6 %
Gold(INR/10g)	30,191	(0.1) %	2.8 %
Gold Comex(USD/oz)	1,205	(0.1) %	(7.9) %
SILVER(INR/1Kg)	36,436	(1.8) %	(5.6) %
Aluminium(USD/MT)	2,084	(1.3) %	(7.6) %
Copper(USD/MT)	5,951	(1.1) %	(17.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** The US manufacturing sector unexpectedly grew at a faster rate in the month of August, according to a report released by the Institute for Supply Management on Tuesday. The ISM said its purchasing managers index climbed to 61.3 in August from 58.1 in July. The Reserve Bank Of Australia (RBA) decided to leave the cash rate unchanged at 1.50%. The bank noted in a statement that the global economic expansion is continuing. A number of advanced economies are growing at an above-trend rate and unemployment rates are low. Growth in China has slowed a little, with the authorities easing policy while continuing to pay close attention to the risks in the financial sector. Globally, inflation remains low, although it has increased in some economies and further increases are expected given the tight labour markets. UK construction activity grew at the weakest pace in three months in August, survey data from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index fell notably to 52.9 in August from July's 14-month peak of 55.8. All three broad categories of activity registered a drop in momentum since the previous month.

**Global Equities:** US and European stocks eased on rising trade tensions and the sell-off in emerging market currencies. US-China trade tensions remained in focus ahead of looming US tariffs on Chinese imports.

**Indian Economy:** India is set to generate 100 GW solar energy by 2022, noted the Union Minister of Commerce & Industry and Civil Aviation, Suresh Prabhu. He said that demand for energy will increase due to rapid development taking place in India and fossil fuel is not going to last forever and therefore there is need for renewable energy. Suresh Prabhu said that fossil fuel is not going to last forever even if its resources are managed in the best possible manner. He said that the use of shale gas and oil is limited and it adversely impacts the environment. The threat of climate change has become a reality and it has affected bio-diversity of the planet. Imbalanced use of energy is the root cause of many environmental problems in different parts of the world. It is causing unprecedented heat wave conditions in Europe, intensity and frequency of typhoons have also increased.

**Equity Markets:** Local stocks settled lower, dragged down by banks and FMCG stocks, as the rupee slumped to a record low and oil prices rose sharply. A bout of volatility was seen in early trade as the key benchmark indices reversed initial gains to sink in red on negative Asian stocks. Fresh selling pulled the key benchmark indices low in mid-afternoon trade. Indices cut losses after hitting intraday low in late trade.

**Corporate News:** Indian airlines are likely to post combined losses of up to \$1.9 billion this financial year led by full-service carriers like Air India and Jet Airways driven by rising costs and low air fares, aviation consulting firm CAPA India said. IT major Tata Consultancy Services Tuesday became the second Indian company to attain a market valuation of over Rs 8 lakh crore mark following surge in its share price. India's crude steel output rose by 8% to 9 million tonnes (MT) in July this year, according to the World Steel Association. ABB India has redeemed the entire 600 unsecured rated listed redeemable non-convertible debentures (debentures) of face value of Rs 1 crore each on 4 September 2018.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	202.9	202.9	(24.8)
MF(INR cr)	266.1	158.2	365.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,785	39,537	33,890
F&O(INR cr)	1,017,419	812,412	891,826

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	12.9	14.3
NSE VIX	13.8	13.6	13.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,431	(1.4) %	12.8 %	Energy	15,588	(0.1) %	17.3 %
IT	16,049	2.1 %	26.3 %	Pharma	10,206	(1.5) %	18.4 %
Metals	3,586	(1.9) %	1.3 %	Finance	11,522	(0.9) %	12.3 %
Auto	10,754	(1.7) %	(2.8) %	PSU	3,167	(3.5) %	11.0 %
FMCG	31,443	(2.1) %	18.6 %	Real Estate	268	(1.8) %	(9.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Infosys	737	2.8 %	29.6 %	Sun TV Net	724	(7.0) %	(15.9) %
HCL Techno	1,076	2.6 %	9.9 %	Havells In	669	(6.6) %	31.8 %
Tech Mahin	764	2.4 %	19.3 %	L&T Fin.Ho	169	(6.1) %	5.5 %
TCS	2,099	2.2 %	44.3 %	Ambuja Cem	228	(5.0) %	(5.1) %
Wipro	313	1.6 %	8.2 %	DLF	202	(5.0) %	0.4 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Gross Domestic Product (QoQ) (2Q)	05-09-2018	01:30	AUD	-	0.01
Gross Domestic Product (YoY) (2Q)	05-09-2018	01:30	AUD	-	0.031
International Merchandise Trade (Canadian dollar) (JUL)	05-09-2018	12:30	CAD	-	-
Labor Productivity (QoQ) (2Q)	05-09-2018	12:30	CAD	-	(0.003)
Bank of Canada Rate Decision (SEP 5)	05-09-2018	14:00	CAD	-	0.015
Caixin China PMI Composite (AUG)	05-09-2018	01:45	CNY	-	52.3
Caixin China PMI Services (AUG)	05-09-2018	01:45	CNY	-	52.8
Markit/ADACI Italy Composite PMI (AUG)	05-09-2018	07:45	EUR	-	53
Markit/ADACI Italy Services PMI (AUG)	05-09-2018	07:45	EUR	-	54
Markit France Composite PMI (AUG F)	05-09-2018	07:50	EUR	-	-
Markit France Services PMI (AUG F)	05-09-2018	07:50	EUR	-	-
Markit Germany Services PMI (AUG F)	05-09-2018	07:55	EUR	-	-
Markit/BME Germany Composite PMI (AUG F)	05-09-2018	07:55	EUR	-	-
Markit Eurozone Composite PMI (AUG F)	05-09-2018	08:00	EUR	-	-
Markit Eurozone Services PMI (AUG F)	05-09-2018	08:00	EUR	-	-
ECB's Praet Speaks in Vienna	05-09-2018	08:30	EUR	-	-
Euro-Zone Retail Sales (MoM) (JUL)	05-09-2018	09:00	EUR	-	0.003
Euro-Zone Retail Sales (YoY) (JUL)	05-09-2018	09:00	EUR	-	0.012
New Car Registrations (YoY) (AUG)	05-09-2018	08:00	GBP	-	-
Markit/CIPS UK Composite PMI (AUG)	05-09-2018	08:30	GBP	-	53.6
Markit/CIPS UK Services PMI (AUG)	05-09-2018	08:30	GBP	-	53.5
Official Reserves (Changes) (AUG)	05-09-2018	08:30	GBP	-	-
Nikkei Japan PMI Composite (AUG)	05-09-2018	00:30	JPY	-	51.8
Nikkei Japan PMI Services (AUG)	05-09-2018	00:30	JPY	-	51.3
Foreign Buying Japan Bonds (AUG 31)	05-09-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (AUG 31)	05-09-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (AUG 31)	05-09-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 31)	05-09-2018	23:50	JPY	-	-
Consumer Confidence Index (AUG)	05-09-2018	12:00	MXN	-	107



ANZ Commodity Price (AUG)	05-09-2018	01:00	NZD	-	(0.032)
MBA Mortgage Applications (AUG 31)	05-09-2018	11:00	USD	-	-
Trade Balance (JUL)	05-09-2018	12:30	USD	-	-
Fed's Bullard Speaks in New York	05-09-2018	13:20	USD	-	-
Fed's Kashkari Speaks at Townhall in Bozeman, Montana	05-09-2018	20:00	USD	-	-

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