



05 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,599	(2.4) %	3.8 %
BSE SENSEX	35,169	(2.2) %	5.8 %
CNX BANK	24,819	(1.0) %	2.0 %
CNX MIDCAP	16,737	(2.0) %	(12.4) %
CNX SMALLCAP	6,059	(2.2) %	(23.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,627	(0.8) %	7.3 %
S&P 500	2,902	(0.8) %	7.6 %
FTSE 100	7,418	(1.2) %	(3.0) %
HANG SENG	26,624	(1.7) %	(12.8) %
NIKKEI	23,976	(0.6) %	2.0 %
SHANGHAI COMPOSITE	2,821	1.1 %	(15.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.58	0.9 %	15.6 %
EUR/USD	1.15	(0.5) %	(4.2) %
GBP/USD	1.30	(0.1) %	(3.6) %
USD/JPY	113.91	(0.1) %	1.1 %
USD/AUD	1.42	2.3 %	10.7 %
USD/SGD	1.38	0.6 %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	76	1.6 %	26.6 %
Gold(INR/10g)	31,057	0.2 %	5.8 %
Gold Comex(USD/oz)	1,200	(0.9) %	(8.3) %
SILVER(INR/1Kg)	38,291	(0.4) %	(0.8) %
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: The US Commerce Department released a report on Thursday showing a substantial rebound in factory orders in the month of August. The Commerce Department said factory orders surged up by 2.3%. The global manufacturing sector is witnessing a notable slowdown in the rate of expansion. The J.P.Morgan Global Manufacturing PMI, a composite index produced by J.P.Morgan and IHS Markit in association with ISM and IFPSM, slipped to a 22-month low of 52.2 in September, down from 52.6 in August. Although the PMI has remained above the neutral 50.0 mark since March 2016, its level has now declined in each of the past five months. The FAO Food Price Index (FFPI) averaged 165.4 points in September 2018, down 2.3 points (1.4%) from August and some 13 points (7.4%) below its level in the corresponding period last year. Only the sugar price index firmed in September, whereas the values of the other sub-indices, led by cereals, dropped from the previous month. UK car registrations plunged in September as regulatory changes impact supply, data from the Society of Motor Manufacturers and Traders showed. The new car market posted a double-digit annual decline of 20.5% in September, after a 23.1% rise in August.

Global Equities: Sentiments remained stressed following the recent developments in Italy. DOW came under pressure and fell 200 points amid profit selling after hitting record highs.

Indian Economy: India's service sector continued to expand during September, but at a marginal rate amid reports of underwhelming market demand. The seasonally adjusted Nikkei India Services Business Activity Index recorded 50.9 during September. That was down from 51.5 in August and the lowest reading in the current four-month sequence of rising activity. The seasonally adjusted Nikkei India Composite PMI Output Index also recorded a fall during September. Posting a level of 51.6, the index was down from 51.9 in August and at its lowest level in four months. The provisional figures of Direct Tax collections up to September, 2018 (Half-yearly figures) show that gross collections are at Rs. 5.47 lakh crore which is 16.7% higher than the gross collections for the corresponding period of last year.

Equity Markets: Local stocks took a sharp tumble yesterday with the benchmark Nifty sliding under 10550 mark to test its lowest level in more than four months. Major blue chip stocks came under heavy selling pressure. The barometer index, the S&P BSE Sensex, fell 806.47 points or 2.24% to 35,169.16, as per the provisional closing data. The Nifty 50 index fell 309.85 points or 2.85% to 10,548.40, as per the provisional closing data.

Corporate News: Banking shares would be in focus ahead of the outcome of Reserve Bank of India (RBI)'s three-day Monetary Policy Committee (MPC) meeting today, 5 October 2018. Local oil marketing companies could see continued stress as the government has announced Rs 2.50 a litre cut in petrol and diesel prices, factoring in excise duty reduction of Rs 1.50 per litre and asking oil companies to absorb another Re 1. NBCC (India) has received a Letter of Award (LoA) of work from IIM Ranchi to provide Project Management Consultancy for development of permanent campus (Phase-1 works) amounting Rs. 400 crore (approx). TVS Motor Company introduced the new TVS Jupiter Grande. The special edition, launched for the festive season, will join the wide portfolio of the flagship scooter brand - TVS Jupiter. Boasting of a host of new features and a unique Starlight Blue colour, the TVS Jupiter Grande is an epitome of magnificence. Eros International Media has received revision in credit ratings from CARE. The rating for long term bank facilities (Rs 563 crore) is CARE BBB-; Stable (Revised from CARE BBB+) while the rating for short term bank facilities (Rs 187 crore) is CARE A3 (Revised from CARE A3+).



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(209.1)	(215.0)	(36.5)
MF(INR cr)	1,700.1	1,700.1	413.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	43,448	42,704	35,118
F&O(INR cr)	2,026,272	1,325,602	963,953

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.6	11.8	14.0
NSE VIX	18.9	18.0	13.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,819	(1.0) %	2.0 %	Energy	14,428	(6.1) %	8.6 %
IT	15,441	(2.9) %	21.5 %	Pharma	9,631	(3.2) %	11.7 %
Metals	3,572	(0.5) %	0.9 %	Finance	10,482	(1.0) %	2.1 %
Auto	9,207	(1.8) %	(16.7) %	PSU	2,778	(0.3) %	(2.7) %
FMCG	28,630	(2.9) %	8.0 %	Real Estate	215	(0.7) %	(27.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	817	4.9 %	(38.5) %	H P C L	217	(13.5) %	(37.0) %
NHPC Ltd	24	4.3 %	(14.1) %	B P C L	331	(12.4) %	(21.8) %
SBI Life I	565	4.3 %	(17.3) %	I O C L	140	(11.4) %	(17.7) %
ICICI Bank	317	4.2 %	20.9 %	Vodafone I	34	(7.9) %	(56.6) %
ICICI Lomb	778	4.0 %	(0.8) %	Reliance I	1,122	(6.9) %	25.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (AUG)	05-10-2018	01:30	AUD	-	0
RBA's Heath gives speech in Canberra	05-10-2018	01:35	AUD	-	-
Full Time Employment Change (SEP)	05-10-2018	12:30	CAD	-	40.4
Hourly Earnings Permanent Employees (YoY) (SEP)	05-10-2018	12:30	CAD	-	0.026
International Merchandise Trade (Canadian dollar) (AUG)	05-10-2018	12:30	CAD	-	-
Net Change in Employment (SEP)	05-10-2018	12:30	CAD	-	-
Part Time Employment Change (SEP)	05-10-2018	12:30	CAD	-	(92)
Participation Rate (SEP)	05-10-2018	12:30	CAD	-	65.3
Unemployment Rate (SEP)	05-10-2018	12:30	CAD	-	0.06
Foreign Currency Reserves (SEP)	05-10-2018	07:00	CHF	-	-
Consumer Price Index (MoM) (SEP)	05-10-2018	07:15	CHF	-	0
Consumer Price Index (YoY) (SEP)	05-10-2018	07:15	CHF	-	0.012
CPI Core (YoY) (SEP)	05-10-2018	07:15	CHF	-	0.005
CPI EU Harmonized (MoM) (SEP)	05-10-2018	07:15	CHF	-	0
CPI EU Harmonized (YoY) (SEP)	05-10-2018	07:15	CHF	-	0.013
German Factory Orders (MoM) (AUG)	05-10-2018	06:00	EUR	-	(0.009)
German Factory Orders n.s.a. (YoY) (AUG)	05-10-2018	06:00	EUR	-	(0.009)
German Producer Price Index (MoM) (AUG)	05-10-2018	06:00	EUR	-	0.002
German Producer Price Index (YoY) (AUG)	05-10-2018	06:00	EUR	-	0.03
Halifax House Price 3Mths/Year (SEP)	05-10-2018	07:30	GBP	-	0.037
Halifax House Prices (MoM) (SEP)	05-10-2018	07:30	GBP	-	0.001
Unit Labor Costs (YoY) (2Q)	05-10-2018	08:30	GBP	-	0.031
Labor Cash Earnings (YoY) (AUG)	05-10-2018	00:00	JPY	-	0.015
Real Cash Earnings (YoY) (AUG)	05-10-2018	00:00	JPY	-	0.004
Coincident Index (AUG P)	05-10-2018	05:00	JPY	-	116.1
Leading Index CI (AUG P)	05-10-2018	05:00	JPY	-	103.9
Average Hourly Earnings (MoM) (SEP)	05-10-2018	12:30	USD	-	0.004
Average Hourly Earnings (YoY) (SEP)	05-10-2018	12:30	USD	-	0.029
Annualized Weekly Hours All Employees (SEP)	05-10-2018	12:30	USD	-	24.5



Change in Manufact. Payrolls (SEP)	05-10-2018	12:30	USD	-	-
Change in Non-farm Payrolls (SEP)	05-10-2018	12:30	USD	-	-
Change in Private Payrolls (SEP)	05-10-2018	12:30	USD	-	-
Labor Force Participation Rate (SEP)	05-10-2018	12:30	USD	-	0.627
Trade Balance (AUG)	05-10-2018	12:30	USD	-	-
Two-Month Payroll Net Revision (SEP)	05-10-2018	12:30	USD	-	-
Underemployment Rate (SEP)	05-10-2018	12:30	USD	-	0.074
Unemployment Rate (SEP)	05-10-2018	12:30	USD	-	0.039
Fed's Bostic Speaks at Financial Literacy Conference	05-10-2018	16:30	USD	-	-
Fed's Kaplan Speaks in Waco	05-10-2018	16:30	USD	-	-
Baker Hughes U.S. Rig Count (OCT 5)	05-10-2018	17:00	USD	-	-
Consumer Credit (AUG)	05-10-2018	19:00	USD	-	-

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