



06 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,750	0.0 %	5.3 %
BSE SENSEX	35,575	(0.2) %	7.2 %
CNX BANK	26,503	0.0 %	8.9 %
CNX MIDCAP	18,128	0.0 %	(5.1) %
CNX SMALLCAP	7,162	0.0 %	(9.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,357	0.8 %	(1.9) %
S&P 500	2,737	0.9 %	1.5 %
FTSE 100	7,603	0.4 %	(0.6) %
HANG SENG	28,182	(0.2) %	(7.6) %
NIKKEI	21,547	(0.8) %	(8.3) %
SHANGHAI COMPOSITE	2,734	(0.9) %	(18.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.94	0.5 %	8.3 %
EUR/USD	1.17	0.2 %	(2.7) %
GBP/USD	1.32	0.1 %	(2.2) %
USD/JPY	110.68	0.3 %	(1.8) %
USD/AUD	1.35	0.3 %	5.9 %
USD/SGD	1.37	0.2 %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.0 %	22.8 %
Gold(INR/10g)	30,467	(0.1) %	3.8 %
Gold Comex(USD/oz)	1,257	(0.1) %	(3.9) %
SILVER(INR/1Kg)	39,093	(0.5) %	1.3 %
Aluminium(USD/MT)	2,121	(2.1) %	(6.0) %
Copper(USD/MT)	6,459	(1.9) %	(10.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	0.0 %	0.4 %

Global Economy: The US Federal Reserve is likely to go ahead with interest rate hikes despite mounting concerns about a possible trade war, according to the minutes of the Fed's June meeting. At that meeting, the Fed raised rates and projected four rate increases in 2018 instead of three previously planned. The central bank maintained its outlook for three rate hikes in 2019. Fed noted that the information reviewed for the June 12-13 meeting indicated that labor market conditions continued to strengthen in recent months, and that real gross domestic product (GDP) appeared to be rising at a solid rate in the first half of the year. The International Monetary Fund said the largest euro area economy will grow 2.2% in 2018 and 2.1% next year. Germany's economic growth is set to moderate in the near term as rising protectionist trends, geopolitical uncertainty, or a reassessment of sovereign risk in the euro area could lead to bouts of financial turbulence, according to the fund. German factory orders grew 2.6% month-on-month in May, in contrast to a revised 1.6% drop in April, data from Destatis showed Thursday.

Global Equities: US stocks jumped on good buying. European shares rose as auto sector surged on a report of tariff talks between the US and Europe.

Indian Economy: Robotics will have to be integrated as key components of the government's flagship 'Make in India' programme for attracting global manufacturers to set up their highly efficient and automated supply chain facilities in the country, an ASSOCHAM study has pointed out. Robotics are a settled necessity for taking Indian industry globally competitive and the country attractive for outside entrepreneurs for the PM's "Make in India" drive as an industry location for global companies as well as domestic ones," a comprehensive study has stated. With several global auto firms setting up base in India and many hoping to export vehicles from the country both vehicle assembly and obtaining components by several Indian and JV component firms would require extensive automation to be at par with international standards, it said.

Equity Markets: Local stocks settled with modest losses as gains in index heavyweight ITC helped cushion steep losses triggered by slide in index heavyweights Infosys and Reliance Industries. IT stocks were mostly lower. Realty stocks dropped.

Corporate News: IT major Infosys has partnered with Siemens PLM Software to develop applications and services for the open cloud-based IoT operating system called MindSphere. Apollo Hospitals Enterprise has acquired 50% stake in Medics International Lifesciences, Lucknow for a consideration of Rs 91 crore. Medics owns a 330 beds super speciality hospital at Lucknow. The hospital is expected to be commissioned in the next 3-4 months. The Indian engineering exports have managed to grow by close to 20 per cent for the April-May, 2018, reflecting a "so far so good" scenario even as the US -China tariff war has spread to some key trading markets in Europe, Canada and Mexico and shows no early signs of abating, said the EEPC India, the apex body of engineering exporters.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	156.8	12.0	(41.1)
MF(INR cr)	2,352.5	424.2	494.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,947	28,672	32,784
F&O(INR cr)	1,518,098	882,020	839,721

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.1	16.0	15.3
NSE VIX	12.6	12.9	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,503	0.3 %	8.9 %	Energy	13,171	(1.5) %	(0.9) %
IT	13,971	(1.1) %	9.9 %	Pharma	9,274	(1.3) %	7.6 %
Metals	3,322	(1.4) %	(6.1) %	Finance	11,043	0.2 %	7.6 %
Auto	10,926	0.1 %	(1.2) %	PSU	2,752	(0.5) %	(3.6) %
FMCG	29,399	1.0 %	10.9 %	Real Estate	265	(1.8) %	(10.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	349	3.9 %	13.8 %	United Spi	629	(5.6) %	(3.7) %
UltraTech	3,936	3.8 %	(1.1) %	Titan Comp	838	(5.5) %	(11.2) %
Bosch	18,084	3.3 %	(2.3) %	Infosys	1,284	(4.5) %	12.9 %
Ambuja Cem	207	3.2 %	(13.6) %	Tata Steel	553	(3.1) %	(4.4) %
ITC	273	3.1 %	5.5 %	Vedanta	221	(3.0) %	(21.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (JUN)	06-07-2018	6:30	AUD	-	-
Full Time Employment Change (JUN)	06-07-2018	12:30	CAD	-	(31)
Hourly Earnings Permanent Employees (YoY) (JUN)	06-07-2018	12:30	CAD	-	0.039
International Merchandise Trade (Canadian dollar) (MAY)	06-07-2018	12:30	CAD	-	-
Net Change in Employment (JUN)	06-07-2018	12:30	CAD	-	-
Part Time Employment Change (JUN)	06-07-2018	12:30	CAD	-	23.6
Participation Rate (JUN)	06-07-2018	12:30	CAD	-	65.3
Unemployment Rate (JUN)	06-07-2018	12:30	CAD	-	0.058
Ivey Purchasing Managers Index s.a. (JUN)	06-07-2018	14:00	CAD	-	62.5
Foreign Currency Reserves (JUN)	06-07-2018	7:00	CHF	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (MAY)	06-07-2018	6:00	EUR	-	0.02
German Industrial Production s.a. (MoM) (MAY)	06-07-2018	6:00	EUR	-	(0.01)
Halifax House Price 3Mths/Year (JUN)	06-07-2018	7:30	GBP	-	0.019
Halifax House Prices (MoM) (JUN)	06-07-2018	7:30	GBP	-	0.015
Unit Labor Costs (YoY) (1Q)	06-07-2018	8:30	GBP	-	0.021
Labor Cash Earnings (YoY) (MAY)	06-07-2018	0:00	JPY	-	0.008
Real Cash Earnings (YoY) (MAY)	06-07-2018	0:00	JPY	-	0
BOJ Outright Bond Purchase 1~3 Years	06-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	06-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	06-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	06-07-2018	1:10	JPY	-	-
Coincident Index (MAY P)	06-07-2018	5:00	JPY	-	117.5
Leading Index CI (MAY P)	06-07-2018	5:00	JPY	-	106.2
Average Hourly Earnings (MoM) (JUN)	06-07-2018	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (JUN)	06-07-2018	12:30	USD	-	0.027
Average Weekly Hours All Employees (JUN)	06-07-2018	12:30	USD	-	34.5
Change in Manufact. Payrolls (JUN)	06-07-2018	12:30	USD	-	-
Change in Non-farm Payrolls (JUN)	06-07-2018	12:30	USD	-	-
Change in Private Payrolls (JUN)	06-07-2018	12:30	USD	-	-



Labor Force Participation Rate (JUN)	06-07-2018	12:30	USD	-	0.627
Trade Balance (MAY)	06-07-2018	12:30	USD	-	-
Two-Month Payroll Net Revision (JUN)	06-07-2018	12:30	USD	-	-
Underemployment Rate (JUN)	06-07-2018	12:30	USD	-	0.076
Unemployment Rate (JUN)	06-07-2018	12:30	USD	-	0.038
EIA Natural Gas Storage Change (JUN 29)	06-07-2018	14:30	USD	-	66
EIA Working Natural Gas Implied Flow (JUN 29)	06-07-2018	14:30	USD	-	66
Baker Hughes U.S. Rig Count (JUL 06)	06-07-2018	17:00	USD	-	1047

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