



06 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,477	0.0 %	12.4 %
BSE SENSEX	38,018	(0.4) %	14.3 %
CNX BANK	27,376	0.0 %	12.5 %
CNX MIDCAP	19,246	0.0 %	0.8 %
CNX SMALLCAP	7,435	0.0 %	(6.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,975	0.1 %	4.6 %
S&P 500	2,889	(0.3) %	7.2 %
FTSE 100	7,383	(1.0) %	(3.5) %
HANG SENG	27,244	(2.6) %	(10.7) %
NIKKEI	22,581	(0.5) %	(3.9) %
SHANGHAI COMPOSITE	2,704	(1.7) %	(19.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.76	0.8 %	12.7 %
EUR/USD	1.16	0.4 %	(3.0) %
GBP/USD	1.29	0.5 %	(4.4) %
USD/JPY	111.27	0.1 %	(1.3) %
USD/AUD	1.39	(0.1) %	8.6 %
USD/SGD	1.37	0.1 %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	0.1 %	15.7 %
Gold(INR/10g)	30,274	0.3 %	3.1 %
Gold Comex(USD/oz)	1,199	(0.5) %	(8.4) %
SILVER(INR/1Kg)	36,398	(0.1) %	(5.7) %
Aluminium(USD/MT)	2,040	(2.1) %	(9.6) %
Copper(USD/MT)	5,823	(2.2) %	(18.9) %

FIXED INCOME

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

Global Economy: The US Commerce Department released a report on Wednesday showing the US trade deficit widened in the month of July. The Commerce Department said the trade deficit widened to \$50.1 billion in July from a revised \$45.7 billion in June. China services sector continued to expand in August, albeit at a slower rate, the latest survey from Caixin revealed on Wednesday with a 10-month low PMI score of 51.5, down sharply from 52.8 in July. There was a steeper rise in input costs across both the manufacturing and services sectors. The composite index fell to a five-month low of 52.0 in August from 52.3 in July. UK services sector expanded at a faster pace in August on stronger new orders, survey data from IHS Markit showed Wednesday. The IHS Markit/Chartered Institute of Procurement & Supply services Purchasing Managers' Index rose to 54.3 from 53.5 in July. The indicator has reached its second-highest level since February.

Global Equities: Global stocks mostly dropped as heightened worries over international trade conflicts curbed investor appetite for riskier assets.

Indian Economy: India's private sector growth slows in August driven by weaker growth across manufacturing and services sectors, survey data from IHS Markit showed Wednesday. The services Purchasing Managers' Index declined to 51.5 in August from 21-month peak of 54.2 in July. Nikkei composite output index dropped to 51.9 in August from July's 21-month high of 54.1. Nonetheless, a score above 50 indicates expansion.

Equity Markets: Key benchmark indices logged modest losses in a highly volatile session of trade amid negative global cues. The Sensex regained the psychological 38,000 mark after sliding below that level in intraday trade. Domestic stocks nudged higher in early trade. Volatility struck bourses in morning trade as the key benchmark indices cut losses soon after reversing intraday gains. Indices slumped in afternoon trade as selling pressure intensified. The Sensex slid for 6th straight session.

Corporate News: Bank of Baroda has increased the marginal cost of funds based lending rate (MCLR) by 5 basis points (bps) above existing level across all tenors with effect from September 7, 2018, the bank said in a release. The recent weakness in the Indian Rupee, which has been hitting a series of all-time lows in last few days, is expected to continue further, according to a latest research update from the State Bank of India (SBI). Aurobindo Pharma announced the signing of a definitive agreement to acquire certain assets from Sandoz Inc., USA ("Sandoz"), a Novartis division, comprising a market leading dermatology business and a portfolio of oral solid products along with commercial and manufacturing infrastructure in the US.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	227.4	215.2	(22.5)
MF(INR cr)	285.3	285.3	364.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,845	39,973	33,954
F&O(INR cr)	1,357,421	994,082	896,059

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.2	13.0	14.3
NSE VIX	13.7	13.6	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,376	(0.2) %	12.5 %	Energy	15,487	(0.7) %	16.5 %
IT	16,040	(0.1) %	26.2 %	Pharma	10,303	1.0 %	19.5 %
Metals	3,623	1.0 %	2.4 %	Finance	11,460	(0.5) %	11.7 %
Auto	10,788	0.3 %	(2.4) %	PSU	3,160	(0.2) %	10.7 %
FMCG	31,169	(0.9) %	17.6 %	Real Estate	265	(1.1) %	(10.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Hind.Zinc	302	3.3 %	(0.3) %	Bharat Ele	94	(13.5) %	(34.7) %
Yes Bank	344	2.9 %	12.3 %	Bharti Inf	271	(4.5) %	(19.6) %
Aurobindo	697	2.9 %	17.6 %	Interglobe	872	(4.2) %	(34.4) %
Power Fin.	84	2.5 %	(4.0) %	Godrej Con	1,345	(3.9) %	20.6 %
Cadila Hea	402	2.4 %	4.4 %	Vodafone I	48	(3.0) %	(38.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (JUL)	06-09-2018	01:30	AUD	-	-
AiG Performance of Construction Index (AUG)	06-09-2018	22:30	AUD	-	52
Building Permits (MoM) (JUL)	06-09-2018	12:30	CAD	-	(0.023)
Bank of Canada Wilkins Speech in Saskatchewan	06-09-2018	18:30	CAD	-	-
Gross Domestic Product (QoQ) (2Q)	06-09-2018	05:45	CHF	-	0.006
Gross Domestic Product (YoY) (2Q)	06-09-2018	05:45	CHF	-	0.022
SNB's Zurbruegg holds speech at Lucerne University	06-09-2018	16:30	CHF	-	-
German Factory Orders (MoM) (JUL)	06-09-2018	06:00	EUR	-	(0.04)
German Factory Orders n.s.a. (YoY) (JUL)	06-09-2018	06:00	EUR	-	(0.008)
Markit Germany Construction PMI (AUG)	06-09-2018	07:30	EUR	-	50
ECB's Lautenschlaegger Speaks in Vienna	06-09-2018	11:45	EUR	-	-
BOJ Kataoka speaks in Yokohama	06-09-2018	01:30	JPY	-	-
Overall Household Spending (YoY) (JUL)	06-09-2018	23:30	JPY	-	(0.012)
Challenger Job Cuts (YoY) (AUG)	06-09-2018	11:30	USD	-	(0.042)
ADP Employment Change (AUG)	06-09-2018	12:15	USD	-	-
Continuing Claims (AUG 25)	06-09-2018	12:30	USD	-	-
Initial Jobless Claims (SEP 1)	06-09-2018	12:30	USD	-	-
Nonfarm Productivity (2Q F)	06-09-2018	12:30	USD	-	0.029
Unit Labor Costs (2Q F)	06-09-2018	12:30	USD	-	(0.009)
Markit US Composite PMI (AUG F)	06-09-2018	13:45	USD	-	-
Markit US Services PMI (AUG F)	06-09-2018	13:45	USD	-	-
Cap Goods Orders Nondef Ex Air (JUL F)	06-09-2018	14:00	USD	-	-
Cap Goods Ship Nondef Ex Air (JUL F)	06-09-2018	14:00	USD	-	-
Durable Goods Orders (JUL F)	06-09-2018	14:00	USD	-	-
Durables Ex Transportation (JUL F)	06-09-2018	14:00	USD	-	-
Factory Orders (JUL)	06-09-2018	14:00	USD	-	0.007
Factory Orders Ex Trans (JUL)	06-09-2018	14:00	USD	-	0.004
Fed's Williams Speaks at University of Buffalo	06-09-2018	14:00	USD	-	-
ISM Non-Manufacturing (Services Component) (AUG)	06-09-2018	14:00	USD	-	55.7



EIA Natural Gas Storage Change (AUG 31)	06-09-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (AUG 31)	06-09-2018	14:30	USD	-	-
DOE Cushing OK Crude Inventory (AUG 31)	06-09-2018	15:00	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 31)	06-09-2018	15:00	USD	-	-
DOE U.S. Distillate Inventory (AUG 31)	06-09-2018	15:00	USD	-	-
DOE U.S. Gasoline Inventories (AUG 31)	06-09-2018	15:00	USD	-	-

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