



06 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,899	0.5 %	(6.6) %
BSE SENSEX	36,644	(0.2) %	(5.2) %
CNX BANK	27,072	0.6 %	(10.7) %
CNX MIDCAP	15,546	0.3 %	(15.2) %
CNX SMALLCAP	5,422	0.5 %	(19.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,728	1.4 %	14.6 %
S&P 500	2,976	1.3 %	18.7 %
FTSE 100	7,271	(0.6) %	8.0 %
HANG SENG	26,516	(0.0) %	5.5 %
NIKKEI	21,086	2.1 %	7.8 %
SHANGHAI COMPOSITE	2,986	1.0 %	21.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.00	0.2 %	3.7 %
EUR/USD	1.10	0.3 %	(3.9) %
GBP/USD	1.22	0.6 %	(4.5) %
USD/JPY	106.21	(0.0) %	(3.1) %
USD/AUD	1.47	(1.0) %	3.7 %
USD/SGD	1.39	(0.3) %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.2) %	21.2 %
Gold(INR/10g)	39,006	(0.0) %	23.7 %
Gold Comex(USD/oz)	1,524	(1.8) %	18.1 %
SILVER(INR/1Kg)	49,593	(0.5) %	29.6 %
Aluminium(USD/MT)	1,755	1.2 %	(5.6) %
Copper(USD/MT)	5,777	2.0 %	(1.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

Global Economy: The US factory orders surged up by 1.4% in July after climbing by a downwardly revised 0.5% in June. The ISM said its non-manufacturing index climbed to 56.4 in August after falling to 53.7 in July. US initial jobless claims in the week ending August 31 were 217,000, an increase of 1,000 from the previous week's revised level. Germany's factory orders decreased in July, data from Destatis revealed on Thursday. Factory orders decreased 2.7% over the previous month in July, in contrast to an increase of revised 2.7% seen in June. UK car registrations declined in August as falling demand for diesel and plug-in-hybrid vehicles weighed on the overall market, data from SMMT showed. UK Car sales dropped 1.6% year-on-year in August, which is typically one of the smallest months of the year, the auto industry lobby said. Australia's trade surplus declined in July as exports logged a marginal growth, data from the Australian Bureau of Statistics showed Thursday. Australia's trade surplus declined to A\$7.26 billion in July from June's record A\$7.97 billion. The overall shipments of goods and services rose 1% to A\$42.53 billion. Sweden's central bank left its key interest rate unchanged on Thursday and signaled that it will hike rates in future at a slower pace. The Executive Board of Riksbank decided to hold the repo rate unchanged at -0.25%. Switzerland's economic growth slowed in the second quarter on weak domestic demand and exports, data from the State Secretariat for Economic Affairs, or SECO, showed on Thursday. Gross domestic product advanced 0.3% sequentially in the second quarter, following a revised 0.4 percent expansion seen in the first quarter.

Global Equities: Equities rose on sustained improvement in risk appetite. United States and China have agreed to hold trade talks in Washington early next month.

Indian Economy: Total foreign direct investment inflows into all sectors increased by 28% to \$ 16.33 billion in the first quarter of the current fiscal, according to media reports. Monsoon conditions have further strengthened over Central India and along the West Coast with typical atmospheric signatures becoming even more prominent noted the IMD in a latest update. India needs to customize global learnings and technologies to meet indigenous needs in roads and highways sector, noted V K Singh, Minister of State for Road Transport and Highways, according to a latest update from the CII. Prime Minister Narendra Modi announced a \$1 billion line of credit for the development of Russia's Far East. RBI has announced underwriting auction for sale of Government Securities for Rs 17,000 crore on September 06, 2019. Minister for Road Transport and Highways Nitin Gadkari said he would urge Finance Minister Nirmala Sitharam to temporarily reduce GST rates on automobiles.

Equity Markets: Sensex ended with small losses while the Nifty ended almost flat on Thursday. Trading was volatile on account of weekly expiry of options on the National Stock Exchange. Gains in auto stocks were negated by losses in banks stocks. S&P BSE Sensex fell 80.32 points or 0.22% to 36,644.42. Nifty 50 index rose 3.25 points or 0.03% to 10,847.90.

Corporate News: Tech Mahindra Ltd Announced expansion of its strategic collaboration with AT&T to accelerate AT&T's IT network application, shared systems modernization and movement to the cloud. Hinduja Global Solutions (HGS) announced it has recovered \$1 billion in denied insurance payments on behalf of healthcare systems, a major milestone in what are some of providers' toughest claim. Tata Consultancy Services announced that it has expanded its strategic partnership with Posten Norge AS, a Nordic postal and logistics group, to build a digital stack that will enable product innovation and a superior customer experience. Havells India Ltd, launched India's first complete square-shaped pedestal fan-'Aindrila'.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(438.1)	(438.1)	(0.7)
MF(INR cr)	962.0	962.0	387.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,731	31,175	34,389
F&O(INR cr)	2,649,218	1,694,117	1,302,125

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	18.1	15.6
NSE VIX	17.3	17.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,920	(0.8) %	(11.2) %	Energy	14,339	2.0 %	(13.3) %
IT	16,031	(0.0) %	1.2 %	Pharma	8,072	1.3 %	(13.9) %
Metals	2,314	2.6 %	(25.4) %	Finance	12,123	(1.1) %	(3.0) %
Auto	6,922	2.1 %	(17.7) %	PSU	2,376	0.0 %	(29.8) %
FMCG	28,710	(0.1) %	(4.9) %	Real Estate	256	(1.8) %	(4.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	118	7.8 %	(37.0) %	DLF	159	(2.8) %	(18.5) %
Coal India	195	7.0 %	(17.6) %	H D F C	2,044	(2.7) %	4.3 %
Tata Motor	53	6.8 %	(42.2) %	Indiabulls	448	(2.3) %	(47.1) %
O N G C	125	5.2 %	(20.4) %	ICICI Bank	389	(2.1) %	(2.3) %
B P C L	381	4.7 %	(2.8) %	Divi's Lab	1,639	(1.5) %	(4.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (AUG)	06-09-2019	6:30	AUD	-	-
Full Time Employment Change (AUG)	06-09-2019	12:30	CAD	-	(11.6)
Hourly Wage Rate Permanent Employees (YoY) (AUG)	06-09-2019	12:30	CAD	-	0.045
Net Change in Employment (AUG)	06-09-2019	12:30	CAD	-	-
Part Time Employment Change (AUG)	06-09-2019	12:30	CAD	-	(12.6)
Participation Rate (AUG)	06-09-2019	12:30	CAD	-	65.6
Unemployment Rate (AUG)	06-09-2019	12:30	CAD	-	0.057
Ivey Purchasing Managers Index s.a. (AUG)	06-09-2019	14:00	CAD	-	54.2
Foreign Currency Reserves (AUG)	06-09-2019	7:00	CHF	-	-
German Industrial Production n.s.a. and w.d.a. (YoY) (JUL)	06-09-2019	6:00	EUR	-	(0.052)
German Industrial Production s.a. (MoM) (JUL)	06-09-2019	6:00	EUR	-	(0.015)
Labor Costs SA (QoQ) (2Q)	06-09-2019	6:00	EUR	-	0.011
Labor Costs WDA (YoY) (2Q)	06-09-2019	6:00	EUR	-	0.025
Euro-Zone Employment (QoQ) (2Q F)	06-09-2019	9:00	EUR	-	0.002
Euro-Zone Employment (YoY) (2Q F)	06-09-2019	9:00	EUR	-	0.011
Euro-Zone Government Expenditure (QoQ) (2Q)	06-09-2019	9:00	EUR	-	0.001
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q F)	06-09-2019	9:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q F)	06-09-2019	9:00	EUR	-	0.011
Euro-Zone Gross Fixed Capital (QoQ) (2Q)	06-09-2019	9:00	EUR	-	0.011
Euro-Zone Household Consumption (QoQ) (2Q)	06-09-2019	9:00	EUR	-	0.005
Halifax House Price 3Mths/Year (AUG)	06-09-2019	7:30	GBP	-	0.041
Halifax House Prices (MoM) (AUG)	06-09-2019	7:30	GBP	-	(0.002)
BoE/TNS Inflation Next 12 Mths (AUG)	06-09-2019	8:30	GBP	-	0.031
Coincident Index (JUL P)	06-09-2019	5:00	JPY	-	100.4
Leading Index CI (JUL P)	06-09-2019	5:00	JPY	-	93.3
Average Hourly Earnings (MoM) (AUG)	06-09-2019	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (AUG)	06-09-2019	12:30	USD	-	0.032
Average Weekly Hours All Employees (AUG)	06-09-2019	12:30	USD	-	34.3
Change in Manufact. Payrolls (AUG)	06-09-2019	12:30	USD	-	-



Change in Non-farm Payrolls (AUG)	06-09-2019	12:30	USD	-	-
Change in Private Payrolls (AUG)	06-09-2019	12:30	USD	-	-
Labor Force Participation Rate (AUG)	06-09-2019	12:30	USD	-	0.63
Two-Month Payroll Net Revision (AUG)	06-09-2019	12:30	USD	-	-
Underemployment Rate (AUG)	06-09-2019	12:30	USD	-	0.07
Unemployment Rate (AUG)	06-09-2019	12:30	USD	-	0.037
Baker Hughes U.S. Rig Count (SEP 6)	06-09-2019	17:00	USD	-	-

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