



07 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,400	0.1 %	11.6 %
BSE SENSEX	37,692	0.4 %	13.3 %
CNX BANK	27,852	(0.2) %	14.5 %
CNX MIDCAP	19,248	0.3 %	0.8 %
CNX SMALLCAP	7,610	0.2 %	(4.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,502	0.2 %	2.7 %
S&P 500	2,850	0.4 %	5.7 %
FTSE 100	7,664	0.1 %	0.2 %
HANG SENG	27,820	0.5 %	(8.8) %
NIKKEI	22,507	(0.1) %	(4.2) %
SHANGHAI COMPOSITE	2,705	(1.3) %	(19.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.89	0.3 %	8.2 %
EUR/USD	1.16	(0.2) %	(3.7) %
GBP/USD	1.29	(0.5) %	(4.2) %
USD/JPY	111.31	(0.3) %	(1.3) %
USD/AUD	1.35	(0.4) %	5.8 %
USD/SGD	1.37	(0.1) %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.8 %	14.3 %
Gold(INR/10g)	29,491	0.2 %	0.5 %
Gold Comex(USD/oz)	1,217	(0.4) %	(7.0) %
SILVER(INR/1Kg)	37,645	0.4 %	(2.5) %
Aluminium(USD/MT)	2,001	(0.8) %	(11.3) %
Copper(USD/MT)	6,040	(2.1) %	(15.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.5 %

Global Economy: Germany's factory orders decreased the most in one-and-a-half years in June as both domestic and foreign demand deteriorated on trade tensions, figures from Destatis showed Monday. Eurozone confidence among investors improved to a 3-month high in August as they see signs of relief in the EU's trade dispute with the US, survey data published by think tank Sentix showed. The investor sentiment index climbed to 14.7 in August from 12.1 in July. Factory orders declined 4% month-on-month, reversing a 2.6% increase in May. UK car registrations grew moderately in July, data from the Society of Motor Manufacturers and Traders reported. Car registrations increased 1.2% year-on-year in July to 163,898.

Global Equities: US stocks stayed broadly supported with Nasdaq rising for a fifth straight day as investors focused on healthy corporate earnings.

Indian Economy: FICCI has welcomed the initiative taken by the GST council to specifically discuss the issues and concerns being faced by MSMEs. The decision of the GST council to set up a group of ministers comprising Finance Ministers of Bihar, Assam, Delhi, Punjab, and Kerala under the chairmanship of Minister of State for Finance Shiv Pratap Shukla will help in addressing the problems faced by the MSMEs, said Rashesh Shah, President, FICCI. He added that the emphasis of the GST council on the fitment committee providing solutions with regard to the rate changes required, along with the pilot project for providing cash back facility to promote digital Payments, are also steps that will benefit MSMEs.

Equity Markets: The local stocks logged modest gains in a steady session of trade on buying demand in index pivots. Domestic stocks saw a gap-up opening on positive Asian stocks. Stocks trimmed gains soon after hitting fresh intraday high in morning trade. The Sensex and the Nifty, both, scaled record high in morning trade. Key benchmark indices once again regained strength in mid-morning trade. Stocks trimmed gains in early afternoon trade. Indices hovered in narrow range in afternoon trade. Firmness prevailed on the bourses in mid-afternoon and late trade.

Corporate News: Sun Pharmaceutical Industries announced that it launched Kapsargo Sprinkle (metoprolol succinate) extended release capsules in the US, for the treatment of hypertension (to lower blood pressure), angina pectoris (chest pain), and heart failure (to reduce the risk of cardiovascular mortality and heart-failure hospitalization in patients with heart failure). On a consolidated basis, Adani Ports And Special Economic Zone's net profit fell 9.14% to Rs 697.40 crore on 12.17% decline in net sales to Rs 2411.03 crore in Q1 June 2018 over Q1 June 2017. Sagar Cements said that its consolidated cement sales rose 13.40% to 219,748 MTs in July 2018 over July 2017. Consolidated cement production/purchase rose 4.87% to 230,193 MTs in July 2018 over July 2017. Unichem Laboratories announced that its API (Active Pharmaceutical Ingredient) manufacturing facility at Roha, Maharashtra was inspected by US Food and Drug Administration (USFDA) from 30 July 2018 to 3 August 2018. Four observations were made, which do not impact continuity of the company's business and its manufacturing activity.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	59.2	(20.6)	(29.7)
MF(INR cr)	117.5	(32.1)	403.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,205	35,959	33,159
F&O(INR cr)	472,159	943,841	872,955

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.3	12.1	14.6
NSE VIX	12.6	12.4	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,899	0.7 %	14.7 %	Energy	15,319	0.7 %	15.3 %
IT	14,606	(0.3) %	14.9 %	Pharma	9,409	(1.0) %	9.1 %
Metals	3,406	0.7 %	(3.8) %	Finance	11,699	0.5 %	14.0 %
Auto	10,823	0.4 %	(2.1) %	PSU	3,324	2.6 %	16.4 %
FMCG	31,222	(0.6) %	17.8 %	Real Estate	269	(0.6) %	(9.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,066	7.0 %	(19.8) %	GAIL (Indi	376	(3.1) %	15.9 %
Axis Bank	597	3.8 %	19.6 %	United Spi	601	(2.2) %	(8.0) %
ICICI Bank	315	3.3 %	20.3 %	Dr Reddy's	2,234	(2.0) %	4.8 %
St Bk of I	309	3.1 %	25.3 %	Kotak Mah.	1,283	(2.0) %	17.0 %
P & G Hygi	10,730	3.0 %	14.3 %	MRF	76,892	(2.0) %	5.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Cash Rate Target (AUG 7)	07-08-2018	04:30	AUD	-	0.015
Foreign Reserves (Australian dollar) (JUL)	07-08-2018	06:30	AUD	-	-
Ivey Purchasing Managers Index s.a. (JUL)	07-08-2018	14:00	CAD	-	63.1
UBS Real Estate Bubble Index (2Q)	07-08-2018	06:00	CHF	-	1.1
Foreign Currency Reserves (JUL)	07-08-2018	07:00	CHF	-	-
German Current Account (euros) (JUN)	07-08-2018	06:00	EUR	-	-
German Exports s.a. (MoM) (JUN)	07-08-2018	06:00	EUR	-	0.018
German Imports s.a. (MoM) (JUN)	07-08-2018	06:00	EUR	-	0.007
German Industrial Production n.s.a. and w.d.a. (YoY) (JUN)	07-08-2018	06:00	EUR	-	0.031
German Industrial Production s.a. (MoM) (JUN)	07-08-2018	06:00	EUR	-	0.026
German Trade Balance (JUN)	07-08-2018	06:00	EUR	-	-
Halifax House Price 3Mths/Year (JUL)	07-08-2018	07:30	GBP	-	0.018
Halifax House Prices (MoM) (JUL)	07-08-2018	07:30	GBP	-	0.003
Labor Cash Earnings (YoY) (JUN)	07-08-2018	00:00	JPY	-	0.021
Real Cash Earnings (YoY) (JUN)	07-08-2018	00:00	JPY	-	0.013
Coincident Index (JUN P)	07-08-2018	05:00	JPY	-	116.8
Leading Index CI (JUN P)	07-08-2018	05:00	JPY	-	106.9
Bank Lending Ex-Trusts (YoY) (JUL)	07-08-2018	23:50	JPY	-	0.021
Bank Lending incl Trusts (YoY) (JUL)	07-08-2018	23:50	JPY	-	0.022
BOJ Summary of Opinions (JUL)	07-08-2018	23:50	JPY	-	-
BoP Current Account Balance (JUN)	07-08-2018	23:50	JPY	-	-
Trade Balance - BOP Basis (Yen) (JUN)	07-08-2018	23:50	JPY	-	-
ANZ Truckometer Heavy (MoM) (JUL)	07-08-2018	22:00	NZD	-	(0.015)
JOLTS Job Openings (JUN)	07-08-2018	14:00	USD	-	6638
U.S. to Sell 4-Week Bills	07-08-2018	15:30	USD	-	-
U.S. to Sell 3-Year Notes	07-08-2018	17:00	USD	-	-
Consumer Credit (JUN)	07-08-2018	19:00	USD	-	-

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