



07 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,558	0.2 %	13.2 %
BSE SENSEX	38,243	0.6 %	15.2 %
CNX BANK	27,439	(0.1) %	12.8 %
CNX MIDCAP	19,355	0.1 %	1.3 %
CNX SMALLCAP	7,498	0.2 %	(5.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,996	0.1 %	4.7 %
S&P 500	2,878	(0.4) %	6.8 %
FTSE 100	7,319	(0.9) %	(4.3) %
HANG SENG	26,975	(1.0) %	(11.6) %
NIKKEI	22,488	(0.4) %	(4.3) %
SHANGHAI COMPOSITE	2,692	(0.5) %	(19.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.99	0.6 %	13.1 %
EUR/USD	1.16	0.1 %	(3.3) %
GBP/USD	1.29	0.4 %	(4.4) %
USD/JPY	110.56	(0.9) %	(1.9) %
USD/AUD	1.39	0.5 %	9.0 %
USD/SGD	1.38	0.0 %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	(1.6) %	13.8 %
Gold(INR/10g)	30,535	0.9 %	4.0 %
Gold Comex(USD/oz)	1,204	0.4 %	(8.0) %
SILVER(INR/1Kg)	36,701	0.8 %	(4.9) %
Aluminium(USD/MT)	2,046	0.3 %	(9.3) %
Copper(USD/MT)	5,850	0.5 %	(18.5) %

FIXED INCOME

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

Global Economy: The Commerce Department said US factory orders fell by 0.8% in July after climbed by a downwardly revised 0.6% in June. ADP said private sector employment climbed by 163,000 jobs in August after jumping by a revised 217,000 jobs in July. German economy is likely to expand 1.9% each this year and next, before a gradual slowdown in 2020, the Ifo Institute said Thursday. Earlier, the think tank had projected 1.8% expansion for both 2018 and 2019 in the largest euro area economy. Nonetheless, Ifo said there will be no return to the high growth rate of 2017. Ifo expects capacity utilization in the German economy to remain clearly above average and increases in wages and prices to continue to accelerate. Private consumption is set to be the main driver of economic expansion in 2018 and 2019. Australia's trade surplus decreased in July, the Australian Bureau of Statistics (ABS) reported. The trade surplus fell to a seasonally adjusted A\$1.55 billion in July from A\$1.94 billion in June. Data from the commodity supplying nation showed that exports dropped 1% from the previous month, while imports remained broadly unchanged in July, noted ABS.

Global Equities: Overall mood remained subdued in global stocks as lack of clarity on trade issues clubbed with a rather choppy buying pattern by funds weighed on the sentiments.

Indian Economy: The Union Minister for Commerce & Industry and Civil Aviation Suresh Prabhu has said that today's India is a growing India and that phenomenal changes have been brought about in both social and economic sector reforms at the same time. Noting the 8.3% growth in GDP in the last quarter, the Minister said that this is going to be consolidated, going forward. He said that India will become a 5 trillion dollar economy in seven years, and certainly a 10 trillion dollar economy by 2035, and that the Government has prepared a multi-sectoral strategy for the same. The Minister was speaking at the India Ideas Summit, organized by the US-India Business Council.

Equity Markets: Local stocks rose in a volatile session yesterday as the Indian Rupee slipped to fresh lows beyond 72 per US dollar mark. Shares regained some lost ground on Thursday after declining sharply in the past few sessions. Stocks drifted higher in early trade as buying resumed in index pivots after recent slide. Key benchmark indices nudged higher in morning trade amid volatility. Stocks once again firmed up in mid-afternoon trade. Indices extended gains and hit fresh intraday high in late trade.

Corporate News: L&T Technology Services has signed a Share Purchase Agreement (SPA) to acquire Graphene Semiconductor Services. The acquisition will also include all its 3 overseas subsidiaries incorporate in namely Singapore, Malaysia and Taiwan. Bajaj Auto announced its plans to expand 3 wheeler & Quadricycle capacity to 1 million per year as Govt announces "no-permit" regime for auto rickshaws powered by Alternate Fuels. Tata Steel announced a new sustainable technology which could save half the amount of carbon dioxide released during steel making following tests at its Ijmuiden site in the Netherlands. According to a latest update from the FICCI and JLL, rapid urbanisation is expected to offer significant opportunities for real estate and infrastructure development in Indian cities.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(43.9)	128.8	(22.7)
MF(INR cr)	150.7	218.0	362.8

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,895	39,454	33,990
F&O(INR cr)	2,187,007	1,292,313	907,689

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.9	13.3	14.3
NSE VIX	13.7	13.6	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,469	0.3 %	12.9 %	Energy	15,803	2.0 %	18.9 %
IT	16,082	0.3 %	26.6 %	Pharma	10,583	2.7 %	22.8 %
Metals	3,632	0.2 %	2.6 %	Finance	11,502	0.4 %	12.1 %
Auto	10,799	0.1 %	(2.4) %	PSU	3,163	0.1 %	10.8 %
FMCG	31,157	(0.0) %	17.6 %	Real Estate	266	0.5 %	(10.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	759	8.9 %	28.1 %	Shriram Tr	1,198	(4.9) %	(18.4) %
Cadila Hea	422	5.1 %	9.7 %	Bharat Ele	91	(3.4) %	(37.0) %
Power Fin.	87	4.1 %	(0.1) %	Sun TV Net	698	(3.1) %	(18.9) %
Cummins In	774	3.9 %	8.0 %	Vodafone I	47	(2.8) %	(40.2) %
NMDC	116	3.8 %	(1.9) %	Zee Entert	470	(2.5) %	(18.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (JUL)	07-09-2018	01:30	AUD	-	(0.011)
Investment Lending (JUL)	07-09-2018	01:30	AUD	-	(0.027)
Value of Loans (MoM) (JUL)	07-09-2018	01:30	AUD	-	(0.01)
Foreign Reserves (Australian dollar) (AUG)	07-09-2018	06:30	AUD	-	-
Full Time Employment Change (AUG)	07-09-2018	12:30	CAD	-	(28)
Hourly Earnings Permanent Employees (YoY) (AUG)	07-09-2018	12:30	CAD	-	0.03
Net Change in Employment (AUG)	07-09-2018	12:30	CAD	-	-
Part Time Employment Change (AUG)	07-09-2018	12:30	CAD	-	82
Participation Rate (AUG)	07-09-2018	12:30	CAD	-	65.4
Unemployment Rate (AUG)	07-09-2018	12:30	CAD	-	0.058
Ivey Purchasing Managers Index s.a. (AUG)	07-09-2018	14:00	CAD	-	61.8
Unemployment Rate (AUG)	07-09-2018	05:45	CHF	-	0.024
Unemployment Rate s.a. (AUG)	07-09-2018	05:45	CHF	-	0.026
Foreign Currency Reserves (AUG)	07-09-2018	07:00	CHF	-	-
German Current Account (euros) (JUL)	07-09-2018	06:00	EUR	-	-
German Exports s.a. (MoM) (JUL)	07-09-2018	06:00	EUR	-	0
German Imports s.a. (MoM) (JUL)	07-09-2018	06:00	EUR	-	0.012
German Industrial Production n.s.a. and w.d.a. (YoY) (JUL)	07-09-2018	06:00	EUR	-	0.025
German Industrial Production s.a. (MoM) (JUL)	07-09-2018	06:00	EUR	-	(0.009)
German Labor Costs SA (QoQ) (2Q)	07-09-2018	06:00	EUR	-	0.01
German Labor Costs WDA (YoY) (2Q)	07-09-2018	06:00	EUR	-	0.023
German Trade Balance (JUL)	07-09-2018	06:00	EUR	-	-
Euro-Zone Government Expenditure (QoQ) (2Q)	07-09-2018	09:00	EUR	-	0
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q F)	07-09-2018	09:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q F)	07-09-2018	09:00	EUR	-	0.022
Euro-Zone Gross Fixed Capital (QoQ) (2Q)	07-09-2018	09:00	EUR	-	0.005
Euro-Zone Household Consumption (QoQ) (2Q)	07-09-2018	09:00	EUR	-	0.005
Halifax House Price 3Mths/Year (AUG)	07-09-2018	07:30	GBP	-	0.033
Halifax House Price 12Mths/Year (AUG)	07-09-2018	07:30	GBP	-	0.014



BoE/TNS Inflation Next 12 Mths (AUG)	07-09-2018	08:30	GBP	-	0.029
Labor Cash Earnings (YoY) (JUL)	07-09-2018	00:00	JPY	-	0.036
Real Cash Earnings (YoY) (JUL)	07-09-2018	00:00	JPY	-	0.028
Coincident Index (JUL P)	07-09-2018	05:00	JPY	-	-
Leading Index CI (JUL P)	07-09-2018	05:00	JPY	-	-
Bi-Weekly Consumer Price Index (AUG 31)	07-09-2018	13:00	MXN	-	-
Bi-Weekly Consumer Price Index (YoY) (AUG 31)	07-09-2018	13:00	MXN	-	-
Bi-Weekly Core Consumer Price Index (AUG 31)	07-09-2018	13:00	MXN	-	-
Consumer Price Index (MoM) (AUG)	07-09-2018	13:00	MXN	-	0.0054
Consumer Price Index (YoY) (AUG)	07-09-2018	13:00	MXN	-	0.0481
Consumer Price Index Core (MoM) (AUG)	07-09-2018	13:00	MXN	-	0.0029
Average Hourly Earnings (MoM) (AUG)	07-09-2018	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (AUG)	07-09-2018	12:30	USD	-	0.027
Average Weekly Hours All Employees (AUG)	07-09-2018	12:30	USD	-	34.5
Change in Manufact. Payrolls (AUG)	07-09-2018	12:30	USD	-	-
Change in Non-farm Payrolls (AUG)	07-09-2018	12:30	USD	-	-
Change in Private Payrolls (AUG)	07-09-2018	12:30	USD	-	-
Fed's Rosengren Makes Opening Remarks at Boston Fed Conference	07-09-2018	12:30	USD	-	-
Labor Force Participation Rate (AUG)	07-09-2018	12:30	USD	-	0.629
Two-Month Payroll Net Revision (AUG)	07-09-2018	12:30	USD	-	-
Underemployment Rate (AUG)	07-09-2018	12:30	USD	-	0.075
Unemployment Rate (AUG)	07-09-2018	12:30	USD	-	0.039
Fed's Mester Moderates Panel at Boston Fed conference	07-09-2018	13:00	USD	-	-
Fed's Kaplan Speaks at Energy Conference in Dallas	07-09-2018	16:45	USD	-	-
Baker Hughes U.S. Rig Count (SEP 7)	07-09-2018	17:00	USD	-	-

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