



07 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,175	(1.2) %	(4.2) %
BSE SENSEX	37,673	(1.1) %	(3.1) %
CNX BANK	27,732	(2.4) %	(8.6) %
CNX MIDCAP	15,574	(0.9) %	(15.1) %
CNX SMALLCAP	5,417	(1.2) %	(19.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,574	1.4 %	13.9 %
S&P 500	2,952	1.4 %	17.8 %
FTSE 100	7,155	1.1 %	6.3 %
HANG SENG	25,821	(1.1) %	2.7 %
NIKKEI	21,410	0.3 %	9.4 %
SHANGHAI COMPOSITE	2,905	(0.9) %	17.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.80	(0.2) %	2.0 %
EUR/USD	1.10	0.2 %	(4.2) %
GBP/USD	1.23	0.4 %	(3.3) %
USD/JPY	107.01	(0.5) %	(2.4) %
USD/AUD	1.49	(0.4) %	4.6 %
USD/SGD	1.38	(0.2) %	1.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.8 %	13.9 %
Gold(INR/10g)	38,151	0.6 %	21.0 %
Gold Comex(USD/oz)	1,510	(0.3) %	17.0 %
SILVER(INR/1Kg)	45,086	(0.1) %	17.8 %
Aluminium(USD/MT)	1,702	0.3 %	(8.4) %
Copper(USD/MT)	5,599	(0.5) %	(4.1) %

FIXED INCOME

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

Global Economy: The US non-farm payroll employment rose by 136,000 jobs in September. The increases in employment in July and August were upwardly revised to 166,000 jobs and 168,000 jobs, respectively, reflecting the addition of 45,000 more jobs than previously reported. The average monthly job growth has still slowed from 223,000 jobs per month in 2018 to 161,000 jobs per month so far in 2019. The US unemployment rate fell to 3.5% in September from 3.7% in August. With this drop, the unemployment rate fell to its lowest level since hitting a matching rate in December of 1969. UK economic conditions weakened in the third quarter reflecting a marked deterioration in manufacturing sector activity, survey results from the British Chambers of Commerce showed Friday. Manufacturing firms reporting increased domestic sales fell to zero. Australia's retail sales advanced 0.4% on month in August, following a flat growth a month ago, data from the Australian Bureau of Statistics showed on Friday. This was the fastest growth in four months.

Global Equities: US stocks saw an impressive surge as weak jobs data spurred hopes of a further decline in interest rates. The DOW jumped 1.4 as a recovery from one month low extended.

Indian Economy: The Monetary Policy Committee (MPC) of the Reserve Bank of India decided to reduce the policy repo rate under the liquidity adjustment facility (LAF) by 25 basis points to 5.15% from 5.40% with immediate effect. Consequently, the reverse repo rate under the LAF stands reduced to 4.90%, and the marginal standing facility (MSF) rate and the Bank Rate to 5.40%. The MPC also decided to continue with an accommodative stance as long as it is necessary to revive growth, while ensuring that inflation remains within the target. Real GDP growth forecast for 2019-20 is revised downwards from 6.9% in the August policy to 6.1% - 5.3% in Q2 of 2019-20 and in the range of 6.6-7.2% for H2 of 2019-20 - with risks evenly balanced; GDP growth for Q1 of 2020-21 is also revised downwards to 7.2%. The IHS Markit Services Purchasing Managers' Index fell to a 19-month low of 48.7 in September from 52.4 in August. It was the second month this year the index had fallen below the 50-mark separating growth from contraction - the last one being in June.

Equity Markets: Key barometers extended losses for fifth consecutive session on Friday, dragged by selling pressure in banks stocks. Market sentiment was dented after the Reserve Bank of India (RBI) cut its FY20 GDP growth rate forecast sharply to 6.1% from 6.9%. Investors were also cautious ahead of US jobs numbers. The barometer index, the S&P BSE Sensex, fell 433.56 points or 1.14% to 37,673.31. The Nifty 50 index fell 139.25 points or 1.23% to 11,174.75.

Corporate News: IT major Wipro would be in focus after it completed acquisition of International TechneGroup Incorporated (ITI). JSW Steel raised \$400 million by allotment of fixed rate senior unsecured notes. Prakash Industries said that CARE Ratings reaffirmed the credit rating CARE BB (Double B) with stable outlook for bank facilities of the company.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(216.7)	(216.7)	8.9
MF(INR cr)	839.3	839.3	415.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,064	30,301	35,246
F&O(INR cr)	976,983	1,874,521	1,339,886

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.9	15.7
NSE VIX	17.6	17.3	17.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,732	(2.4) %	(8.6) %	Energy	15,525	(0.4) %	(6.1) %
IT	15,340	0.4 %	(3.2) %	Pharma	7,397	(0.9) %	(21.1) %
Metals	2,297	(1.3) %	(26.0) %	Finance	12,593	(2.0) %	0.7 %
Auto	7,405	(1.2) %	(12.0) %	PSU	2,174	(1.6) %	(35.8) %
FMCG	30,327	(1.5) %	0.4 %	Real Estate	248	(1.2) %	(7.1) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
NHPC Ltd	23	3.2 %	(9.6) %	Indiabulls	245	(7.9) %	(71.1) %
Bajaj Hold	3,586	1.7 %	7.0 %	Zee Entert	237	(5.8) %	(45.1) %
Piramal En	1,597	1.4 %	(40.7) %	United Bre	1,270	(4.3) %	(10.1) %
Godrej Con	669	1.3 %	(1.2) %	UltraTech	3,980	(4.0) %	(1.8) %
Bandhan Ba	484	1.2 %	(8.6) %	ACC	1,488	(3.7) %	(9.6) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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