



08 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,380	(0.1) %	11.4 %
BSE SENSEX	37,666	(0.1) %	13.3 %
CNX BANK	27,864	(0.0) %	14.5 %
CNX MIDCAP	19,122	(0.1) %	0.1 %
CNX SMALLCAP	7,544	0.2 %	(4.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,629	0.5 %	3.2 %
S&P 500	2,858	0.3 %	6.0 %
FTSE 100	7,718	0.7 %	0.9 %
HANG SENG	28,249	1.5 %	(7.4) %
NIKKEI	22,663	0.7 %	(3.6) %
SHANGHAI COMPOSITE	2,779	2.7 %	(17.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.69	0.1 %	7.9 %
EUR/USD	1.16	0.3 %	(3.4) %
GBP/USD	1.29	(0.5) %	(4.3) %
USD/JPY	111.38	0.1 %	(1.2) %
USD/AUD	1.35	(0.3) %	5.3 %
USD/SGD	1.36	(0.1) %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.2 %	14.6 %
Gold(INR/10g)	29,521	0.1 %	0.6 %
Gold Comex(USD/oz)	1,222	0.4 %	(6.6) %
SILVER(INR/1Kg)	37,861	0.6 %	(1.9) %
Aluminium(USD/MT)	2,026	1.3 %	(10.2) %
Copper(USD/MT)	6,132	1.5 %	(14.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: German exports registered nil growth in June from May after rising 1.7 percent, data from Destatis showed. Meanwhile, monthly growth in imports accelerated to 1.2 percent from 0.7% in May. As a result, the trade surplus fell to a seasonally adjusted EUR 19.3 billion from EUR 20.4 billion in May. Year-on-year, exports grew 7.8%, in contrast to a 1.3% fall in May. At the same time, imports rose at a faster pace of 10.2% after rising 0.9%. UK house prices grew 1.4% month-on-month in July, faster than the 0.9% rise in June, data from the Lloyds bank subsidiary Halifax and IHS Markit showed Tuesday. In three months to July, house prices growth advanced to 3.3% annually from 1.8% in the quarter ended June. The rate was expected to accelerate moderately to 2.7%. The average house price hit a new record of GBP 230,280 in July.

Global Equities: US stocks continued to edge up as upbeat corporate earnings overshadowed concerns about the ongoing trade dispute between the US and China.

Indian Economy: India can focus on numerous goods for expanding its exports to the US and China markets following the hike in duties by both countries on imports from each other, said the Confederation of Indian Industry (CII). With the US imposing additional duty of 25% on imports worth \$34 billion from China, certain Indian products may become more competitive, according to CII. As per CII's analysis, the goods that India should focus on for the US market include items in the categories of machinery, electrical equipment, vehicles and transport parts, chemicals, plastics and rubber products. Countries such as Vietnam, Indonesia, Thailand and Malaysia have increased their exports of these products to the US in recent years, noted CII.

Equity Markets: The local stocks trimmed initial gains amid mild volatility in early trade yesterday. The Sensex and the Nifty, both, scaled record high in early trade. Indices hovered with small gains in a tidy range in morning trade. Key benchmark indices reversed gains and hit intraday low in negative zone in mid-morning trade. Volatility ruled the roost in early afternoon trade as key benchmark indices once again regained positive zone.

Corporate News: MphasiS announced that its board approved a proposal for buyback of equity shares from all the existing shareholders of the company on a proportionate basis through the tender offer method at a maximum price of Rs 1350 per equity share, aggregating to an amount not exceeding Rs 988.27 crore. The company's consolidated net profit rose 8.68% to Rs 258.31 crore on 4.34% increase in net sales to Rs 1820.22 crore in Q1 June 2018 over Q4 March 2018. GAIL (India) will be watched. The company announced that Sales Tax Department raised a demand of Rs 3449.18 crore and interest thereon Rs 1513.04 crore in respect of Hazira unit in Gujarat, treating the transfer of natural gas from the State of Gujarat to other states, as inter-state sales, during the period from April 1994 to March 2001. Glenmark Pharmaceuticals said its partner Elite Pharmaceuticals, Inc., a US specialty pharmaceutical company, has received approval from the US Food and Drug Administration (USFDA) for the abbreviated new drug application (ANDA) for methadone hydrochloride 5 mg and 10 mg tablets.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	65.1	0.8	(28.6)
MF(INR cr)	117.5	(32.1)	403.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,603	35,888	33,186
F&O(INR cr)	562,375	786,579	865,872

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.9	11.8	14.6
NSE VIX	12.6	12.5	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,876	(0.1) %	14.6 %	Energy	15,220	(0.6) %	14.5 %
IT	14,614	0.1 %	15.0 %	Pharma	9,371	(0.4) %	8.7 %
Metals	3,445	1.2 %	(2.7) %	Finance	11,702	0.0 %	14.0 %
Auto	10,856	0.3 %	(1.8) %	PSU	3,252	(2.1) %	13.9 %
FMCG	31,140	(0.3) %	17.5 %	Real Estate	267	(0.6) %	(9.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NMDC	114	6.5 %	(3.0) %	Punjab Nat	83	(8.0) %	(14.0) %
Piramal En	2,906	3.6 %	17.6 %	Adani Port	372	(6.3) %	0.7 %
Tata Steel	573	3.6 %	(1.0) %	Motherson	305	(3.1) %	(5.8) %
Havells In	678	3.0 %	33.5 %	Bank of Ba	146	(2.9) %	3.0 %
Titan Comp	927	2.8 %	(1.8) %	Coal India	275	(2.7) %	(0.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Home Loans (MoM) (JUN)	08-08-2018	01:30	AUD	-	0.011
Investment Lending (JUN)	08-08-2018	01:30	AUD	-	(0.001)
Value of Loans (MoM) (JUN)	08-08-2018	01:30	AUD	-	0.007
RBA Governor Lowe Speech in Sydney (AUG 8)	08-08-2018	03:05	AUD	-	-
Building Permits (MoM) (JUN)	08-08-2018	12:30	CAD	-	0.047
RICS House Price Balance (JUL)	08-08-2018	23:01	GBP	-	0.02
Adjusted Current Account Total (Yen) (JUN)	08-08-2018	00:50	JPY	-	-
Bankruptcies (YoY) (JUL)	08-08-2018	04:30	JPY	-	(0.0226)
Eco Watchers Survey Current (JUL)	08-08-2018	05:00	JPY	-	48.1
Eco Watchers Survey Outlook SA (JUL)	08-08-2018	05:00	JPY	-	50
Foreign Buying Japan Bonds (AUG 3)	08-08-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (AUG 3)	08-08-2018	23:50	JPY	-	-
Housing Loans (YoY) (2Q)	08-08-2018	23:50	JPY	-	0.027
Japan Buying Foreign Bonds (Yen) (AUG 3)	08-08-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 3)	08-08-2018	23:50	JPY	-	-
Japan Money Stock M2+CD (YoY) (JUL)	08-08-2018	23:50	JPY	-	0.032
Japan Money Stock M3 (YoY) (JUL)	08-08-2018	23:50	JPY	-	0.027
Machine Orders (MoM) (JUN)	08-08-2018	23:50	JPY	-	(0.037)
Machine Orders (YoY) (JUN)	08-08-2018	23:50	JPY	-	0.165
RBNZ Official Cash Rate (AUG 9)	08-08-2018	21:00	NZD	-	0.0175
MBA Mortgage Applications (AUG 3)	08-08-2018	11:00	USD	-	-
Fed's Barkin Speaks in Roanoke, Virginia (AUG 8)	08-08-2018	12:45	USD	-	-
DOE Cushing OK Crude Inventory (AUG 3)	08-08-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 3)	08-08-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 3)	08-08-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 3)	08-08-2018	14:30	USD	-	-
U.S. to Sell 10-Year Notes	08-08-2018	17:00	USD	-	-

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