



09 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,493	0.4 %	12.5 %
BSE SENSEX	37,888	0.6 %	14.2 %
CNX BANK	28,174	0.4 %	15.8 %
CNX MIDCAP	19,226	0.4 %	0.7 %
CNX SMALLCAP	7,580	0.3 %	(4.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,584	(0.2) %	3.1 %
S&P 500	2,858	(0.0) %	6.0 %
FTSE 100	7,777	0.8 %	1.7 %
HANG SENG	28,359	0.4 %	(7.1) %
NIKKEI	22,644	(0.1) %	(3.7) %
SHANGHAI COMPOSITE	2,744	(1.3) %	(18.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.63	(0.4) %	7.8 %
EUR/USD	1.16	0.4 %	(3.3) %
GBP/USD	1.29	(0.6) %	(4.8) %
USD/JPY	110.80	(0.5) %	(1.7) %
USD/AUD	1.34	(0.6) %	5.2 %
USD/SGD	1.36	(0.4) %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.2 %	14.6 %
Gold(INR/10g)	29,418	(0.3) %	0.2 %
Gold Comex(USD/oz)	1,222	0.4 %	(6.6) %
SILVER(INR/1Kg)	37,590	(0.7) %	(2.6) %
Aluminium(USD/MT)	2,027	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: China's exports rose 12.2% year-on-year in July. The imports logged a strong double-digit growth of 27.3% from a year ago. Due to higher imports, the trade surplus fell to \$28 billion in July. China's overseas trade with the US also continued to rise in July despite the tariffs, with exports up 11.2% year-on-year, and imports humping 11.1%. Japan Eco Watchers' Index, a measure of peoples' assessment of the Japanese economy weakened more-than-expected in July to the lowest level in nearly two years, survey figures from the Cabinet Office showed. The current index of Economy Watchers' survey dropped to 46.6 in July from 48.1 in June. The index was forecast to fall to 47.8. Moreover, this was the lowest score since September 2016, when it marked 46.3. Any reading above 50 indicates optimism and a score below 50 suggests pessimism.

Global Equities: Chinese foreign trade data showed that the US tariffs did not hurt the export spree of the Asian economic superpower. Overall undertone in the markets was mixed after recent gains though.

Indian Economy: According to a latest update from the government, the CEO of NITI Aayog, Amitabh Kant stated that the installed power generation capacity in India has risen to 344 GigaWatts. India's energy deficit, which stood at over 4% in 2014, has shrunk to less than 1% in 2018. Significant capacity additions have been made in transmission lines, transformer capacity, and inter-regional transmission. India now ranks 26th in the World Bank's "Ease of Getting Electricity" Index, up from 99th in 2014. In the new and renewable energy sector, cumulative installed capacity has nearly doubled, from 35.5 GigaWatts in 2013-14, to about 70 GigaWatts in 2017-18.

Equity Markets: Key equity indices logged modest gains on steady buying demand with the Sensex and the Nifty, both, scaling record highs in intraday as well as on closing basis. The gains were led by strength in index heavyweight Reliance Industries and private sector banks shares. Volatility struck bourses in early trade as the key benchmark indices trimmed almost entire gains after a higher start triggered by positive Asian stocks. Stocks hovered with small gains in morning trade. Fresh buying pushed the key benchmark indices higher in early afternoon and afternoon trade. Stocks extended gains in late trade with the Sensex and the Nifty, both, scaling record highs.

Corporate News: Top lender State Bank of India (SBI) is planning to expand its Yono (you only need one) customer base to 250 million in the next two years. At present 2.5 million users are registered under Yono, the digital platform which offers all financial services and lifestyle products and services of the lender. BPCL could turn lower after massive blast was reported at its main refinery complex of in Mumbai yesterday. BEML reported a loss of Rs 160.34 crore for June quarter against Rs 85.13 crore loss in the corresponding quarter last fiscal. Revenue from operations for the quarter fell 28% to Rs 454.68 crore against Rs 631.66 crore in the last-year period.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	16.4	3.9	(28.1)
MF(INR cr)	117.5	(32.1)	403.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,911	35,725	33,205
F&O(INR cr)	993,827	821,120	867,263

MARKET VOLATILITY

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

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,062	0.7 %	15.3 %	Energy	15,484	1.7 %	16.5 %
IT	14,608	(0.0) %	15.0 %	Pharma	9,307	(0.7) %	8.0 %
Metals	3,454	0.2 %	(2.4) %	Finance	11,770	0.6 %	14.7 %
Auto	10,821	(0.3) %	(2.1) %	PSU	3,281	0.9 %	15.0 %
FMCG	31,303	0.5 %	18.1 %	Real Estate	267	(0.1) %	(9.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Ashok Leyl	126	5.1 %	(15.1) %	Rural Elec	111	(5.6) %	(13.3) %
Bharat Ele	121	3.8 %	(16.4) %	Lupin	826	(4.7) %	6.2 %
O N G C	173	3.0 %	(4.1) %	Power Fin.	82	(3.3) %	(6.1) %
United Spi	605	2.9 %	(7.4) %	Punjab Nat	80	(2.9) %	(16.5) %
Reliance I	1,218	2.8 %	36.4 %	Maruti Suz	9,207	(2.2) %	2.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Housing Starts (JUL)	09-08-2018	12:15	CAD	-	-
New Housing Price Index (MoM) (JUN)	09-08-2018	12:30	CAD	-	0
New Housing Price Index (YoY) (JUN)	09-08-2018	12:30	CAD	-	0.009
Unemployment Rate (JUL)	09-08-2018	05:45	CHF	-	0.024
Unemployment Rate s.a. (JUL)	09-08-2018	05:45	CHF	-	0.026
Consumer Price Index (YoY) (JUL)	09-08-2018	01:30	CNY	-	0.019
Producer Price Index (YoY) (JUL)	09-08-2018	01:30	CNY	-	0.047
ECB Publishes Economic Bulletin (JUL)	09-08-2018	08:00	EUR	-	-
Tokyo Avg Office Vacancies (JUL)	09-08-2018	02:00	JPY	-	2.57
Machine Tool Orders (YoY) (JUL P)	09-08-2018	06:00	JPY	-	0.114
Domestic Corporate Goods Price Index (MoM) (JUL)	09-08-2018	23:50	JPY	-	0.002
Domestic Corporate Goods Price Index (YoY) (JUL)	09-08-2018	23:50	JPY	-	0.028
GDP Business Spending (QoQ) (2Q P)	09-08-2018	23:50	JPY	-	0.003
Gross Domestic Product Annualized s.a. (QoQ) (2Q P)	09-08-2018	23:50	JPY	-	(0.006)
Gross Domestic Product Deflator (YoY) (2Q P)	09-08-2018	23:50	JPY	-	0.005
Gross Domestic Product Private Consumption (QoQ) (2Q P)	09-08-2018	23:50	JPY	-	(0.001)
Gross Domestic Product s.a. (QoQ) (2Q P)	09-08-2018	23:50	JPY	-	(0.002)
Nominal Gross Domestic Product (QoQ) (2Q P)	09-08-2018	23:50	JPY	-	(0.004)
Bi-Weekly Core CPI (JUL 31)	09-08-2018	13:00	MXN	-	0.0019
Bi-Weekly CPI (JUL 31)	09-08-2018	13:00	MXN	-	0.0032
Bi-Weekly CPI (YoY) (JUL 31)	09-08-2018	13:00	MXN	-	0.0485
CPI (MoM) (JUL)	09-08-2018	13:00	MXN	-	0.0039
CPI (YoY) (JUL)	09-08-2018	13:00	MXN	-	0.0465
CPI Core (MoM) (JUL)	09-08-2018	13:00	MXN	-	0.0023
BusinessNZ Manufacturing PMI (JUL)	09-08-2018	22:30	NZD	-	52.8
Card Spending Retail (MoM) (JUL)	09-08-2018	22:45	NZD	-	0.008
Credit Card Spending (MoM) (JUL)	09-08-2018	22:45	NZD	-	0.004
Continuing Claims (JUL 28)	09-08-2018	12:30	USD	-	-
Initial Jobless Claims (AUG 4)	09-08-2018	12:30	USD	-	-



PPI Ex Food, Energy, Trade (MoM) (JUL)	09-08-2018	12:30	USD	-	0.003
PPI Ex Food, Energy, Trade (YoY) (JUL)	09-08-2018	12:30	USD	-	0.027
Producer Price Index Ex Food and Energy (MoM) (JUL)	09-08-2018	12:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (JUL)	09-08-2018	12:30	USD	-	0.028
Producer Price Index Final Demand (MoM) (JUL)	09-08-2018	12:30	USD	-	0.003
Producer Price Index Final Demand (YoY) (JUL)	09-08-2018	12:30	USD	-	0.034
Wholesale Inventories (MoM) (JUN F)	09-08-2018	14:00	USD	-	0
Wholesale Trade Sales (MoM) (JUN)	09-08-2018	14:00	USD	-	0.025
EIA Natural Gas Storage Change (AUG 3)	09-08-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (AUG 3)	09-08-2018	14:30	USD	-	-
U.S. to Sell 30-Year Bonds	09-08-2018	17:00	USD	-	-

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