



09 Aug.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,108	0.7 %	(4.8) %
BSE SENSEX	37,327	1.7 %	(3.3) %
CNX BANK	28,383	1.0 %	(6.4) %
CNX MIDCAP	15,991	1.2 %	(12.8) %
CNX SMALLCAP	5,512	1.2 %	(18.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,378	1.4 %	13.1 %
S&P 500	2,938	1.9 %	17.2 %
FTSE 100	7,286	1.2 %	8.2 %
HANG SENG	26,121	0.5 %	3.9 %
NIKKEI	20,593	0.4 %	5.3 %
SHANGHAI COMPOSITE	2,795	0.9 %	13.4 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.94	0.5 %	2.2 %
EUR/USD	1.12	0.4 %	(2.1) %
GBP/USD	1.22	0.1 %	(4.6) %
USD/JPY	106.08	0.1 %	(3.2) %
USD/AUD	1.48	0.4 %	4.4 %
USD/SGD	1.38	0.0 %	1.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.0) %	13.1 %
Gold(INR/10g)	37,047	0.0 %	17.5 %
Gold Comex(USD/oz)	1,507	0.6 %	16.7 %
SILVER(INR/1Kg)	42,879	0.3 %	12.1 %
Aluminium(USD/MT)	1,738	0.5 %	(6.5) %
Copper(USD/MT)	5,723	0.9 %	(2.0) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.0) %	(0.9) %

**Global Economy:** The US seasonally adjusted initial claims were 209,000, a decrease of 8,000 from the previous week's revised level. The previous week's level was revised up by 2,000 from 215,000 to 217,000. The US Commerce Department said wholesale inventories were flat in June after climbing by 0.4% in May. China's exports edged up 3.3% year-on-year in July after a 1.3% fall in June, figures from the General Administration of Customs showed. China's imports fell by 5.6% after a 7.3% slump in the previous month. The trade surplus for July was \$45.1 billion compared to June's \$50.98 billion. French economy is set to retain its growth momentum in the third quarter, the latest projection from the Bank of France showed. France's Gross domestic product is expected to grow 0.3% in the three months to September, the bank said in its monthly Business Trends report. A measure of the public assessment of the Japanese economy slipped for the third straight month in July survey data from the Cabinet Office showed. Current condition index of the Japanese Economic Watchers' Survey fell to 41.2 in July from 44.0 in June.

**Global Equities:** The US stocks jumped with DOW adding around 1.0% even as developments on the trade front stayed in focus. Chinese shares ended up after six straight sessions of losses.

**Indian Economy:** A survey from Home Credit India, across 12 cities of India across regions revealed that almost 67% of Indians were not opposed to taking loans especially if it fulfills their family's desire or upgrades their lifestyle. Ministry of Agriculture and Farmers' Welfare has said that the country needs a technological breakthrough to make crop insurance scheme a success in India. A notification issued by the consumer affairs ministry under the Essential Commodities Act has noted that the provisions relating to stock limit under any order made under the Act shall not apply to contract farming.

**Equity Markets:** Key equity benchmarks surged amid broad based buying support on Thursday. Shares rallied after media reports suggested that the government is likely to roll back recently-imposed higher tax on foreign portfolio investors (FPIs). Sensex ended above the 37,000 level while the Nifty crossed the 11,000 mark. Trading was volatile on account of expiry of weekly options contracts on the NSE. Sensex rose 636.86 points or 1.74% to settle at 37,327.36. Nifty 50 index rose 176.95 points or 1.63% to settle at 11,032.45.

**Corporate News:** Wipro Limited and Qamunda, an open source software company reinventing workflow automation announced that Wipro has joined the Camunda Partner Program. Bharat Petroleum Corporation (BPCL), Hindalco Industries and GAIL (India) will announce their Q1 results today, 9 August 2019. Tata Chemicals' consolidated net profit rose 16.38% to Rs 239.71 crore on 4.99% rise in total income to Rs 3015.90 crore in Q1 June 2019 over Q1 June 2018. Mahanagar Gas' net profit rose 32.66% to Rs 170.24 crore on 22.55% rise in total income to Rs 777.83 crore in Q1 June 2019 over Q1 June 2018.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(72.1)	(245.9)	15.1
MF(INR cr)	93,566.0	93,566.0	1,374.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,963	37,037	34,264
F&O(INR cr)	2,772,449	1,695,423	1,265,592

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.9	19.4	15.0
NSE VIX	16.1	15.9	17.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,110	1.5 %	(7.3) %	Energy	14,123	2.2 %	(14.6) %
IT	15,868	1.8 %	0.2 %	Pharma	7,965	1.1 %	(15.0) %
Metals	2,419	1.2 %	(22.0) %	Finance	12,581	1.4 %	0.7 %
Auto	6,998	3.0 %	(16.8) %	PSU	2,603	1.7 %	(23.1) %
FMCG	29,132	1.1 %	(3.5) %	Real Estate	264	1.9 %	(1.4) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	598	7.8 %	(24.5) %	Tata Steel	367	(3.8) %	(31.3) %
HCL Techno	1,088	6.4 %	(2.0) %	Cipla	503	(2.9) %	(4.3) %
Tata Motor	124	5.7 %	(33.8) %	Lupin	761	(2.7) %	(0.7) %
Vodafone I	6	5.6 %	(68.2) %	UltraTech	4,233	(2.5) %	4.4 %
Tata Motor	59	5.6 %	(36.4) %	United Bre	1,366	(1.9) %	(3.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Statement on Monetary Policy	09-08-2019	1:30	AUD	-	-
Housing Starts (JUL)	09-08-2019	12:15	CAD	-	-
Building Permits (MoM) (JUN)	09-08-2019	12:30	CAD	-	(0.13)
Full Time Employment Change (JUL)	09-08-2019	12:30	CAD	-	-
Hourly Wage Rate Permanent Employees (YoY) (JUL)	09-08-2019	12:30	CAD	-	0.036
Net Change in Employment (JUL)	09-08-2019	12:30	CAD	-	-
Part Time Employment Change (JUL)	09-08-2019	12:30	CAD	-	-
Participation Rate (JUL)	09-08-2019	12:30	CAD	-	65.7
Unemployment Rate (JUL)	09-08-2019	12:30	CAD	-	0.055
Unemployment Rate (JUL)	09-08-2019	5:45	CHF	-	0.021
Unemployment Rate s.a. (JUL)	09-08-2019	5:45	CHF	-	0.023
Consumer Price Index (YoY) (JUL)	09-08-2019	1:30	CNY	-	0.027
Producer Price Index (YoY) (JUL)	09-08-2019	1:30	CNY	-	0
Money Supply M1 (YoY) (JUL)	09-08-2019	8:00	CNY	-	0.044
German Current Account (euros) (JUN)	09-08-2019	6:00	EUR	-	-
German Exports s.a. (MoM) (JUN)	09-08-2019	6:00	EUR	-	0.011
German Imports s.a. (MoM) (JUN)	09-08-2019	6:00	EUR	-	(0.005)
German Trade Balance (JUN)	09-08-2019	6:00	EUR	-	-
Construction Output (MoM) (JUN)	09-08-2019	8:30	GBP	-	0.006
Construction Output (YoY) (JUN)	09-08-2019	8:30	GBP	-	0.017
Exports (2Q P)	09-08-2019	8:30	GBP	-	0
Government Spending (2Q P)	09-08-2019	8:30	GBP	-	0.014
Gross Domestic Product (QoQ) (2Q P)	09-08-2019	8:30	GBP	-	0.005
Gross Domestic Product (YoY) (2Q P)	09-08-2019	8:30	GBP	-	0.018
Gross Fixed Capital Formation (2Q P)	09-08-2019	8:30	GBP	-	0.021
Imports (2Q P)	09-08-2019	8:30	GBP	-	0.068
Index of Services (3Mo3M) (JUN)	09-08-2019	8:30	GBP	-	0.003
Index of Services (MoM) (JUN)	09-08-2019	8:30	GBP	-	0
Industrial Production (MoM) (JUN)	09-08-2019	8:30	GBP	-	0.014



Industrial Production (YoY) (JUN)	09-08-2019	8:30	GBP	-	0.009
Manufacturing Production (MoM) (JUN)	09-08-2019	8:30	GBP	-	0.014
Manufacturing Production (YoY) (JUN)	09-08-2019	8:30	GBP	-	0
Monthly Gross Domestic Product (MoM) (JUN)	09-08-2019	8:30	GBP	-	0.003
Private Consumption (2Q P)	09-08-2019	8:30	GBP	-	0.007
Total Business Investment (QoQ) (2Q P)	09-08-2019	8:30	GBP	-	0.004
Total Business Investment (YoY) (2Q P)	09-08-2019	8:30	GBP	-	(0.015)
Trade Balance (JUN)	09-08-2019	8:30	GBP	-	-
Trade Balance Non EU GBP/Mn (JUN)	09-08-2019	8:30	GBP	-	-
Visible Trade Balance (Pounds) (JUN)	09-08-2019	8:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	09-08-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	09-08-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	09-08-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	09-08-2019	1:10	JPY	-	-
Industrial Production NSA (YoY) (JUN)	09-08-2019	11:00	MXN	-	(0.033)
PPI Ex Food and Energy (YoY) (JUL)	09-08-2019	12:30	USD	-	0.023
PPI Ex Food, Energy, Trade (MoM) (JUL)	09-08-2019	12:30	USD	-	0
PPI Ex Food, Energy, Trade (YoY) (JUL)	09-08-2019	12:30	USD	-	0.021
PPI Final Demand (YoY) (JUL)	09-08-2019	12:30	USD	-	0.017
Producer Price Index Ex Food and Energy (MoM) (JUL)	09-08-2019	12:30	USD	-	0.003
Producer Price Index Final Demand (MoM) (JUL)	09-08-2019	12:30	USD	-	0.001
Baker Hughes U.S. Rig Count (AUG 9)	09-08-2019	17:00	USD	-	942

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