



09 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,946	0.9 %	(6.2) %
BSE SENSEX	36,982	0.9 %	(4.9) %
CNX BANK	27,248	1.2 %	(10.2) %
CNX MIDCAP	15,607	0.7 %	(14.9) %
CNX SMALLCAP	5,445	0.9 %	(19.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,797	0.3 %	14.9 %
S&P 500	2,979	0.1 %	18.8 %
FTSE 100	7,282	0.2 %	8.1 %
HANG SENG	26,691	0.7 %	6.2 %
NIKKEI	21,200	0.5 %	8.4 %
SHANGHAI COMPOSITE	3,000	0.5 %	21.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.81	(0.3) %	3.4 %
EUR/USD	1.10	0.3 %	(3.6) %
GBP/USD	1.23	1.0 %	(3.5) %
USD/JPY	106.77	0.5 %	(2.6) %
USD/AUD	1.47	(0.4) %	3.3 %
USD/SGD	1.38	(0.2) %	1.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	0.6 %	21.9 %
Gold(INR/10g)	38,185	(2.1) %	21.1 %
Gold Comex(USD/oz)	1,515	(0.6) %	17.3 %
SILVER(INR/1Kg)	46,935	(5.4) %	22.7 %
Aluminium(USD/MT)	1,762	0.4 %	(5.2) %
Copper(USD/MT)	5,788	0.2 %	(0.9) %

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 130,000 jobs in August after climbing by a downwardly revised 159,000 jobs in July. The weaker job growth came as notable increases in employment in healthcare and financial activities were partly offset by the loss of mining and retail jobs. China's central bank reduced further the amount of cash that banks should set aside as reserves to spur liquidity in the economy hit hard by trade wars. The People's Bank of China decided to cut the reserve requirement ratio, or RRR, by 50 basis points, which will take effect on September 16th. The US Federal Reserve Chairman Jerome Powell suggested during a forum that the central has helped keep the economy on solid ground amid the uncertainty caused by Trump's trade war with China. Eurozone economy grew at a slower pace in the second quarter, as previously estimated, reflecting weak household spending and exports, and strengthened the call for stimulus from the European Central Bank. Gross domestic product expanded 0.2% sequentially, following the first quarter's 0.4% expansion. Year-on-year economic growth eased to 1.2% from 1.3%. Germany's industrial production fell 0.6% in July from June, data from Destatis showed Friday. On a yearly basis, industrial production was down 4.2% versus June's 4.7% decrease. Japan's leading index, which measures the future economic activity, came in at 93.6 in July, unchanged from June, preliminary data from the Cabinet Office showed on Friday. A similar lower reading was last seen in April 2011. The coincident index that reflects the current economic activity increased to 99.8 in July from 99.5 in the preceding month.

Global Equities: US stocks ended mixed on Friday following weak jobs data as some corrective pressure was seen after strong gains in previous two sessions.

Indian Economy: In order to boost capital expenditure of the Union Government so as to pump liquidity in the market to boost demand, Ministry of Finance held meeting with the heads of Maharatna and Navratna Central Public Sector Enterprises (CPSEs) and Financial Advisors (FAs) of infrastructure Ministries. Domestic corporate debt market has registered impressive growth. In the five years between June 2014 and June 2019, the market size has grown from Rs 14.43 trillion to Rs 30.63 trillion, marking a jump of 112%, according to B.P Kanungo, Deputy Governor, Reserve Bank of India. Government securities, that constitute the largest segment of the fixed income market, stand at about Rs 58 trillion.

Equity Markets: Key equity benchmarks ended with modest rise in Friday, tracking gains in global peers amid easing US-China trade tensions. The barometer index, the S&P BSE Sensex, rose 337.35 points or 0.92% to 36,981.77. The Nifty 50 index rose 98.30 points or 0.91% to 10,946.20. Buying was wide spread. The S&P BSE Mid-Cap index rose 0.61%. The S&P BSE Small-Cap index rose 0.79%.

Corporate News: Reliance Industries is seeking a minimum price of USD 5.4 per unit for the natural gas it plans to produce from newer fields in the Bay of Bengal block KG-D6 as it changed parameters to suit government policies, noted media reports. India Ratings (Rating Agency) has placed Canara Bank's Long Term Issuer Rating of 'IND AAA' on "Rating Watch Negative (RWN)" following the Finance Ministry's announcement dated 30.08.2019, on the proposed amalgamation of Syndicate Bank into Canara Bank. State-owned Punjab National Bank (PNB) has put up for sale nearly a dozen non-performing assets (NPA) to recover dues of more than Rs 1,234 crore.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(174.8)	(306.5)	(2.4)
MF(INR cr)	464.2	902.1	396.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,069	31,149	34,358
F&O(INR cr)	643,322	1,431,418	1,295,968

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.0	17.4	15.6
NSE VIX	16.3	17.2	17.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,248	1.2 %	(10.2) %	Energy	14,591	1.8 %	(11.7) %
IT	16,035	0.0 %	1.2 %	Pharma	8,069	(0.0) %	(13.9) %
Metals	2,358	1.9 %	(24.0) %	Finance	12,236	0.9 %	(2.1) %
Auto	7,102	2.6 %	(15.6) %	PSU	2,381	0.2 %	(29.6) %
FMCG	28,650	(0.2) %	(5.1) %	Real Estate	254	(0.7) %	(4.8) %

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>
Eicher Mot	16,407	4.1 %	(18.2) %	Indiabulls	426	(5.0) %	(49.8) %
Tech Mahin	722	3.8 %	(8.1) %	DLF	154	(3.2) %	(21.1) %
Maruti Suz	6,187	3.7 %	(9.6) %	Piramal En	1,882	(2.9) %	(30.1) %
ICICI Pru	441	3.3 %	21.6 %	Yes Bank	60	(2.5) %	(78.1) %
Axis Bank	671	3.3 %	(12.3) %	Container	505	(2.1) %	(5.0) %

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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