



09 Oct.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,348	0.0 %	1.3 %
BSE SENSEX	34,474	0.3 %	3.7 %
CNX BANK	24,618	0.0 %	1.2 %
CNX MIDCAP	16,055	0.0 %	(15.9) %
CNX SMALLCAP	5,770	0.0 %	(27.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,487	0.2 %	6.7 %
S&P 500	2,884	(0.0) %	7.0 %
FTSE 100	7,233	(1.2) %	(5.4) %
HANG SENG	26,203	(1.4) %	(14.1) %
NIKKEI	23,784	(0.8) %	1.2 %
SHANGHAI COMPOSITE	2,717	(3.7) %	(18.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.07	0.7 %	16.3 %
EUR/USD	1.15	(0.2) %	(4.3) %
GBP/USD	1.31	0.6 %	(3.1) %
USD/JPY	113.07	(0.7) %	0.3 %
USD/AUD	1.41	(0.3) %	10.4 %
USD/SGD	1.38	0.2 %	3.6 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.0 %	23.1 %
Gold(INR/10g)	31,156	(0.2) %	6.1 %
Gold Comex(USD/oz)	1,207	0.4 %	(7.8) %
SILVER(INR/1Kg)	38,117	(0.9) %	(1.3) %
Aluminium(USD/MT)	2,140	(4.6) %	(5.1) %
Copper(USD/MT)	6,183	(2.0) %	(13.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.0 %	0.8 %

**Global Economy:** China private sector logged a moderate growth in September as improved services activity was offset by softer manufacturing growth, survey data from IHS Markit showed. The Caixin composite output index rose marginally to 52.1 in September from 52.0 in August. Eurozone investor confidence weakened in October largely due to uncertainties about the fiscal policy stance in Italy and the automobile industry in Germany, survey data from think tank Sentix showed. The investor sentiment index fell more-than-expected to 11.4 in October from 12.0 in September. The expected reading was 11.8. The current situation index came in at 33.0, the lowest since April 2017, and down from 35.0 in September. Meanwhile, the expectations indicator rose to -8.3 from -8.8 in the previous month. Germany's industrial production slid 0.3 percent from July, figures from Destatis revealed. Production had decreased 1.3% in July. On a yearly basis, industrial production logged a fall of 0.1%, in contrast the 1.5% increase seen in July.

**Global Equities:** Stocks eyed a potential slowdown in the Chinese economy. China's central bank slashed the level of cash that banks must hold as reserves, injecting a net 750 billion yuan (\$109 billion) into the financial system. It was the fourth reserve requirement cut this year and comes as the economy fights the drag from an escalating trade dispute with the United States.

**Indian Economy:** FICCI said that it welcomes RBI's decision to keep the repo rate unchanged. Rashesh Shah, President FICCI said that this move sends positive signal to the industry and is expected to maintain the momentum in investments seen lately. This was especially important in the wake of tightening financial environment in domestic as well as global market. In fact, investment revival is very important at this juncture; especially when the IBC process is showing that the credit culture in India is changing for the better, which will help not only in handling the existing NPAs, but will also curb the creation of fresh NPAs.

**Equity Markets:** Local stocks saw some bargain buying after testing multi month lows. After reporting steep losses last week, key equity benchmark started the week on a positive note, led by bargain hunting in banks and oil sector stocks. Trading was highly volatile as indices swung between gains and losses in intraday trade. The Sensex bounced back after briefly slipping below the 34,000 mark.

**Corporate News:** Maruti Suzuki India has achieved production of 160,219 units in September 2018 compared to 151,239 units in September 2017, recording a growth of 5.9%. Demand-supply gap following improved power requirement in August this year was met by increased hydel and nuclear power generation bringing down peak deficits to 0.5% according to a report by India Ratings and Research. Local IT counters could be supported as the Indian Rupee hit yet another record low on Monday as it closed at an all-time low of 74.07 against dollar, falling by 30 paise. The Ministry of Corporate Affairs (MCA) has requested the National Company Law Tribunal (NCLT) to relax rules for speedier resolution of the Infrastructure Leasing & Financial Services (IL&FS) debt crisis.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(680.8)	(354.3)	(43.7)
MF(INR cr)	1,131.9	1,239.9	423.2

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,495	42,717	35,236
F&O(INR cr)	794,667	1,108,293	961,158

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.8	13.2	14.0
NSE VIX	20.2	18.8	13.6

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,618	0.7 %	1.2 %	Energy	13,828	4.1 %	4.0 %
IT	15,305	(1.8) %	20.4 %	Pharma	9,506	(0.4) %	10.3 %
Metals	3,339	(3.1) %	(5.7) %	Finance	10,176	(0.4) %	(0.8) %
Auto	8,969	0.6 %	(18.9) %	PSU	2,704	1.8 %	(5.3) %
FMCG	27,706	(0.6) %	4.5 %	Real Estate	202	(3.2) %	(31.8) %

### 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>
HPCL	179	8.5 %	(48.0) %	Vedanta	207	(10.7) %	(26.8) %
Yes Bank	221	7.4 %	(27.8) %	Shriram Tr	941	(9.9) %	(35.9) %
Reliance I	1,109	5.8 %	24.2 %	Hindalco I	223	(7.7) %	5.3 %
IOCL	125	5.8 %	(26.8) %	Piramal En	2,109	(4.9) %	(14.7) %
Kotak Mah.	1,104	5.0 %	0.7 %	Bharat Ele	77	(4.3) %	(46.7) %

### EVENTS CALENDAR

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

..... End of Report .....