



10 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,475	0.0 %	12.4 %
BSE SENSEX	38,024	0.4 %	14.1 %
CNX BANK	28,349	0.1 %	16.5 %
CNX MIDCAP	19,279	0.2 %	0.9 %
CNX SMALLCAP	7,629	0.1 %	(3.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,509	(0.3) %	2.8 %
S&P 500	2,854	(0.1) %	5.9 %
FTSE 100	7,742	(0.5) %	1.2 %
HANG SENG	28,607	0.9 %	(6.3) %
NIKKEI	22,598	(0.2) %	(3.9) %
SHANGHAI COMPOSITE	2,794	1.8 %	(16.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.68	0.0 %	7.9 %
EUR/USD	1.15	(0.6) %	(4.0) %
GBP/USD	1.28	(0.8) %	(5.1) %
USD/JPY	110.98	(0.4) %	(1.6) %
USD/AUD	1.36	0.7 %	6.1 %
USD/SGD	1.37	0.2 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	(3.2) %	10.9 %
Gold(INR/10g)	29,486	0.2 %	0.4 %
Gold Comex(USD/oz)	1,222	0.1 %	(6.6) %
SILVER(INR/1Kg)	37,862	0.7 %	(1.9) %
Aluminium(USD/MT)	2,022	(0.2) %	(10.4) %
Copper(USD/MT)	6,113	(0.3) %	(14.9) %

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)	133.6	25.5	(26.4)
MF(INR cr)	14.8	31.0	397.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,138	36,070	33,259
F&O(INR cr)	1,670,334	942,436	875,898

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.9	11.7	14.5
NSE VIX	12.7	12.5	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,320	0.9 %	16.4 %	Energy	15,491	0.0 %	16.6 %
IT	14,603	(0.0) %	14.9 %	Pharma	9,250	(0.6) %	7.3 %
Metals	3,502	1.4 %	(1.1) %	Finance	11,838	0.6 %	15.4 %
Auto	10,814	(0.1) %	(2.2) %	PSU	3,379	3.0 %	18.4 %
FMCG	31,379	0.2 %	18.4 %	Real Estate	273	2.1 %	(8.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Power Fin.	87	6.4 %	(0.1) %	NMDC	107	(6.1) %	(9.5) %
DLF	201	6.2 %	(0.2) %	Bharti Air	367	(4.7) %	(7.1) %
ICICI Bank	333	4.5 %	27.2 %	Cummins In	653	(4.0) %	(8.8) %
Axis Bank	621	4.2 %	24.4 %	Cipla	619	(2.1) %	7.4 %
Rural Elec	116	4.1 %	(9.7) %	Titan Comp	915	(2.1) %	(3.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Quarterly Statement on Monetary Policy	10-08-2018	01:30	AUD	-	-
Full Time Employment Change (JUL)	10-08-2018	12:30	CAD	-	9.1
Hourly Earnings Permanent Employees (YoY) (JUL)	10-08-2018	12:30	CAD	-	0.035
Net Change in Employment (JUL)	10-08-2018	12:30	CAD	-	-
Part Time Employment Change (JUL)	10-08-2018	12:30	CAD	-	22.7
Participation Rate (JUL)	10-08-2018	12:30	CAD	-	65.5
Unemployment Rate (JUL)	10-08-2018	12:30	CAD	-	0.06
Construction Output SA (MoM) (JUN)	10-08-2018	08:30	GBP	-	0.029
Construction Output SA (YoY) (JUN)	10-08-2018	08:30	GBP	-	0.016
Exports (2Q P)	10-08-2018	08:30	GBP	-	(0.005)
Government Spending (2Q P)	10-08-2018	08:30	GBP	-	0.005
Gross Domestic Product (MoM) (JUN)	10-08-2018	08:30	GBP	-	0.003
Gross Domestic Product (QoQ) (2Q P)	10-08-2018	08:30	GBP	-	0.002
Gross Domestic Product (YoY) (2Q P)	10-08-2018	08:30	GBP	-	0.012
Gross Fixed Capital Formation (2Q P)	10-08-2018	08:30	GBP	-	0.009
Imports (2Q P)	10-08-2018	08:30	GBP	-	(0.006)
Index of Services (3Mo3M) (JUN)	10-08-2018	08:30	GBP	-	0.004
Index of Services (MoM) (JUN)	10-08-2018	08:30	GBP	-	0.003
Industrial Production (MoM) (JUN)	10-08-2018	08:30	GBP	-	(0.004)
Industrial Production (YoY) (JUN)	10-08-2018	08:30	GBP	-	0.008
Manufacturing Production (MoM) (JUN)	10-08-2018	08:30	GBP	-	0.004
Manufacturing Production (YoY) (JUN)	10-08-2018	08:30	GBP	-	0.011
Private Consumption (2Q P)	10-08-2018	08:30	GBP	-	0.002
Total Business Investment (QoQ) (2Q P)	10-08-2018	08:30	GBP	-	(0.004)
Total Business Investment (YoY) (2Q P)	10-08-2018	08:30	GBP	-	0.02
Trade Balance (JUN)	10-08-2018	08:30	GBP	-	-
Trade Balance Non EU GBP/Mn (JUN)	10-08-2018	08:30	GBP	-	-
Visible Trade Balance (Pounds) (JUN)	10-08-2018	08:30	GBP	-	-
Trade Balance Excl. Indus. Goods (MoM) (JUN)	10-08-2018	08:30	GBP	-	0.001



Industrial Production NSA (YoY) (JUN)	10-08-2018	13:00	MXN	-	0.003
Consumer Price Index (MoM) (JUL)	10-08-2018	12:30	USD	-	0.001
Consumer Price Index (YoY) (JUL)	10-08-2018	12:30	USD	-	0.029
Consumer Price Index Core Index s.a. (JUL)	10-08-2018	12:30	USD	-	257.305
Consumer Price Index Ex Food and Energy (MoM) (JUL)	10-08-2018	12:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (JUL)	10-08-2018	12:30	USD	-	0.023
Consumer Price Index n.s.a. (JUL)	10-08-2018	12:30	USD	-	251.989
Real Avg Hourly Earning (YoY) (JUL)	10-08-2018	12:30	USD	-	0
Real Avg Weekly Earnings (YoY) (JUL)	10-08-2018	12:30	USD	-	0.002
Baker Hughes U.S. Rig Count (AUG 10)	10-08-2018	17:00	USD	-	-
Monthly Budget Statement (JUL)	10-08-2018	18:00	USD	-	-

..... End of Report

