



10 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,301	0.0 %	0.9 %
BSE SENSEX	34,299	(0.5) %	3.1 %
CNX BANK	24,528	0.0 %	0.8 %
CNX MIDCAP	16,004	0.0 %	(16.2) %
CNX SMALLCAP	5,756	0.0 %	(27.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,431	(0.2) %	6.5 %
S&P 500	2,880	(0.1) %	6.8 %
FTSE 100	7,238	0.1 %	(5.4) %
HANG SENG	26,173	(0.1) %	(14.2) %
NIKKEI	23,469	(1.3) %	(0.2) %
SHANGHAI COMPOSITE	2,721	0.2 %	(18.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	74.39	0.8 %	16.8 %
EUR/USD	1.15	(0.1) %	(4.1) %
GBP/USD	1.32	0.3 %	(2.6) %
USD/JPY	113.03	(0.6) %	0.3 %
USD/AUD	1.40	(1.0) %	9.8 %
USD/SGD	1.38	(0.2) %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	(0.1) %	23.1 %
Gold(INR/10g)	31,049	(0.3) %	5.8 %
Gold Comex(USD/oz)	1,195	(1.0) %	(8.7) %
SILVER(INR/1Kg)	37,855	(0.7) %	(1.9) %
Aluminium(USD/MT)	2,074	(3.1) %	(8.1) %
Copper(USD/MT)	6,169	(0.2) %	(14.1) %

FIXED INCOME

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

Global Economy: The International Monetary Fund on Tuesday cut its global economic growth forecasts for 2018 and 2019, noting that trade policy tensions and the imposition of import tariffs were taking a toll on commerce while emerging markets struggle with tighter financial conditions and capital outflows. The new forecasts show that a burst of strong growth, fuelled partly by US tax cuts and rising demand for imports, was starting to wane. The IMF said in an update to its World Economic Outlook it was now predicting 3.7% global growth in both 2018 and 2019, down from its July forecast of 3.9% growth for both years. The downgrade reflects a confluence of factors, including the introduction of import tariffs between the United States and China, weaker performances by Eurozone countries, Japan and Britain, and rising interest rates that are pressuring some emerging markets with capital outflows, notably Argentina, Brazil, Turkey and South Africa.

Global Equities: Momentum remained stressed amid global growth worries. Soaring US yields and Chinese economic concerns continued to weigh as well.

Indian Economy: India's growth is expected to increase to 7.3% in 2018 and to 7.4% in 2019 (slightly lower than in the April 2018 World Economic Outlook (WEO) for 2019, given the recent increase in oil prices and the tightening of global financial conditions), up from 6.7% in 2017, the International Monetary Fund (IMF) said in its latest World Economic Outlook report. This acceleration reflected a rebound from transitory shocks (the currency exchange initiative and implementation of the national Goods and Services Tax), with strengthening investment and robust private consumption.

Equity Markets: Local stocks fell yet again as falling rupee and boiling crude oil prices hurt sentiments. Auto stocks tumbled yesterday. Nifty Auto index closed down 2.63%. Among the constituents, Tata Motors Ltd fell 13.19%, Tata Motors-DVR dropped 12.04% and Eicher Motors Ltd shed 4.74%. In other indices, Nifty Media index increased 2.13% and Nifty FMCG index dropped 2.01% on the day. In broad markets, the Nifty 50 has slid 0.45% to close at 10301.05 while the SENSEX has declined 0.51% to close at 34299.47.

Corporate News: KEC International has secured new turnkey order of Rs. 1,496 crore in its Transmission & Distribution business in Bangladesh for Design, Supply and Installation of 400 kV Meghnaghat - Madunaghat Double Circuit Transmission Line. Genus Power Infrastructures has won an order from a State-owned utility for implementation of Advanced Metering Infrastructure (AMI) including supply of 4.31 lakhs smart meters. The value of the order is pegged at Rs. 312 crore (net of tax). Steel Authority of India's Bhilai Steel Plant saw a major fire break out yesterday at a gas pipeline. The unfortunate incident led to nine people being lost while around 14 people got injured. Bank of Baroda's loans to debt laden infrastructure firm IL&FS are performing as of now, according to media reports.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(158.3)	(315.1)	(44.5)
MF(INR cr)	980.2	1,245.4	435.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,001	41,764	35,250
F&O(INR cr)	712,977	1,042,407	959,264

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.7	13.7	14.1
NSE VIX	19.8	18.9	13.7

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,528	(0.4) %	0.8 %	Energy	13,591	(1.7) %	2.3 %
IT	15,370	0.4 %	21.0 %	Pharma	9,639	1.4 %	11.8 %
Metals	3,374	1.0 %	(4.7) %	Finance	10,212	0.4 %	(0.5) %
Auto	8,733	(2.6) %	(21.0) %	PSU	2,670	(1.2) %	(6.5) %
FMCG	27,150	(2.0) %	2.4 %	Real Estate	200	(1.0) %	(32.5) %

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>
Avenue Sup	1,373	5.2 %	1.1 %	Tata Motor	184	(13.2) %	(45.6) %
Dr Reddy's	2,454	4.9 %	15.1 %	Tata Motor	102	(12.0) %	(46.4) %
Adani Port	319	4.7 %	(13.8) %	Titan Comp	750	(7.9) %	(20.6) %
Zee Entert	433	4.5 %	(25.2) %	Interglobe	724	(7.3) %	(45.5) %
Bajaj Fin.	2,061	4.4 %	13.3 %	Pidilite I	914	(6.0) %	(2.9) %

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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