



10 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,313	0.0 %	(3.0) %
BSE SENSEX	38,178	1.7 %	(1.8) %
CNX BANK	28,786	0.0 %	(5.1) %
CNX MIDCAP	15,723	0.0 %	(14.2) %
CNX SMALLCAP	5,396	0.0 %	(19.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,346	0.7 %	12.9 %
S&P 500	2,919	0.9 %	16.5 %
FTSE 100	7,167	0.3 %	6.4 %
HANG SENG	25,683	(0.8) %	2.2 %
NIKKEI	21,456	(0.6) %	9.7 %
SHANGHAI COMPOSITE	2,925	0.4 %	18.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.90	0.1 %	2.1 %
EUR/USD	1.10	0.1 %	(4.2) %
GBP/USD	1.22	(0.9) %	(4.2) %
USD/JPY	107.31	0.3 %	(2.1) %
USD/AUD	1.49	(0.1) %	4.5 %
USD/SGD	1.38	(0.0) %	1.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.3) %	13.1 %
Gold(INR/10g)	38,179	0.2 %	21.1 %
Gold Comex(USD/oz)	1,511	0.0 %	17.1 %
SILVER(INR/1Kg)	45,682	1.8 %	19.4 %
Aluminium(USD/MT)	1,732	1.8 %	(6.8) %
Copper(USD/MT)	5,651	0.9 %	(3.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

Global Economy: The minutes of the Federal Reserve's September monetary policy meeting revealed a few participants expressed concerns that the markets expect more interest rate cuts than are appropriate. The global economy is now in a synchronized slowdown, noted Kristalina Georgieva, the Managing Director of the IMF. Two years ago, the global economy was in a synchronized upswing. Measured by GDP, nearly 75% of the world was accelerating. Today, even more of the world economy is moving in synch but, unfortunately, this time growth is decelerating. In 2019, the Fund expects slower growth in nearly 90% of the world, she noted in a speech titled 'Decelerating Growth Calls for Accelerating Action'. The World Bank expects economic growth across Europe and Central Asia to ease this year reflecting the slowdown in both Russia and Turkey. According to the latest World Bank Economic Update for Europe and Central Asia, growth in the emerging and developing countries of Europe and Central Asia is set to fall to a four-year low of 1.8% this year from 3.2% in 2018. The growth rate is projected to improve to 2.7% in 2020 and to 3% in 2021. The unemployment rate in the OECD reached its lowest level on record in August, data from the Paris-based Organization for Economic Cooperation and Development said Wednesday. The jobless rate fell to 5.1% in August, the lowest since 1998, from 5.2% in July. Australia's consumer confidence weakened to the lowest level in more than four years in October despite interest rate reductions, survey results from Westpac showed Wednesday. The Westpac-Melbourne Institute Index of Consumer Sentiment dropped to 92.8 in October from 98.2 in September.

Global Equities: European stocks edged up on hopes that the British government intends to bring a revised Brexit deal back to Parliament.

Indian Economy: Union Cabinet Chaired by Prime Minister Narendra Modi today approved to release an additional instalment of Dearness Allowance (DA) to Central Government employees and Dearness Relief (DR) to pensioners w.e.f. 01.07.2019 representing an increase of 5% over the existing rate of 12% of the Basic pay/Pension, to compensate for price rise. This increase is in accordance with the accepted formula, which is based on the recommendations of the 7th Central Pay Commission. India has slipped 10 places to the 68th rank on an annual global competitiveness index, according to a latest update. The annual Global Competitiveness Index is compiled by Geneva-based World Economic Forum (WEF). The WEF said that India ranks high in terms of macroeconomic stability and market size though its financial sector is relatively deep and stable despite the high delinquency rate, which contributes to weakening the soundness of its banking system. The asset under management of mutual fund industry slipped by 4% in September at Rs 24.50 lakh crore against Rs 25.48 lakh crore in August largely following outflow from liquid funds and tepid inflow into equity funds.

Equity Markets: Local market settled with robust gains on Wednesday, due to bargain hunting. The rally were supported by firmness in banking and financial shares. The Nifty ended above its 200-day simple moving average placed at 11,266.70. BSE Sensex jumped 645.97 points or 1.72% to 38,177.95. The Nifty 50 index rose 186.90 points or 1.68% to 11,313.30.

Corporate News: Shares of Indiabulls Housing Finance and Lakshmi Vilas Bank will be in focus. RBI has informed that the application for voluntary amalgamation of the Indiabulls Housing Finance with Lakshmi Vilas Bank can't be allowed. Indiabulls Housing Finance said that the meeting of the board of directors of the company is scheduled on 14 October 2019, to consider and approve the proposal of buyback of equity shares of the company. IndusInd Bank and TCS will declare their Q2 results today, 10 October 2019. Bharti Airtel announced that its wholly-owned subsidiary Network i2i Limited (the Company), has priced a offering of US\$ 750 million 5.650% Subordinated Perpetual Securities (the Securities). The Securities are guaranteed by Bharti Airtel.





FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(51.8)	(137.2)	6.1
MF(INR cr)	789.0	588.7	418.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,850	32,285	35,247
F&O(INR cr)	1,558,082	1,609,664	1,337,878

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	18.4	15.7
NSE VIX	17.2	17.4	17.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,786	3.7 %	(5.1) %	Energy	15,470	0.9 %	(6.4) %
IT	15,129	(0.8) %	(4.5) %	Pharma	7,236	1.2 %	(22.8) %
Metals	2,318	2.1 %	(25.3) %	Finance	12,970	3.0 %	3.8 %
Auto	7,461	1.4 %	(11.3) %	PSU	2,217	3.1 %	(34.5) %
FMCG	30,269	0.2 %	0.3 %	Real Estate	250	2.0 %	(6.3) %

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>
Vodafone I	6	13.6 %	(67.0) %	Piramal En	1,395	(5.9) %	(48.2) %
Ashok Leyl	69	7.2 %	(23.6) %	Yes Bank	43	(5.3) %	(84.3) %
Shriram Tr	1,124	5.8 %	(9.1) %	Hero Motoc	2,604	(2.6) %	1.8 %
IndusInd B	1,309	5.4 %	(24.9) %	Titan Comp	1,230	(2.3) %	9.8 %
NMDC	97	5.4 %	(8.4) %	Zee Entert	246	(2.2) %	(43.0) %

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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