



11 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,962	0.3 %	2.5 %
BSE SENSEX	39,785	0.4 %	2.7 %
CNX BANK	31,034	0.0 %	2.3 %
CNX MIDCAP	17,791	0.0 %	(3.0) %
CNX SMALLCAP	6,398	0.0 %	(5.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,063	0.3 %	11.7 %
S&P 500	2,887	0.5 %	15.2 %
FTSE 100	7,376	0.6 %	9.5 %
HANG SENG	27,579	2.3 %	9.7 %
NIKKEI	21,134	1.2 %	8.0 %
SHANGHAI COMPOSITE	2,852	0.9 %	15.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.22	0.1 %	(0.3) %
EUR/USD	1.13	0.7 %	(1.1) %
GBP/USD	1.27	0.3 %	(0.1) %
USD/JPY	108.26	(0.0) %	(1.2) %
USD/AUD	1.43	(0.3) %	0.6 %
USD/SGD	1.36	(0.1) %	(0.1) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(15.8) %	14.4 %
Gold(INR/10g)	32,527	(0.2) %	3.2 %
Gold Comex(USD/oz)	1,328	(0.9) %	2.8 %
SILVER(INR/1Kg)	36,657	(0.8) %	(4.2) %
Aluminium(USD/MT)	1,721	(0.7) %	(7.4) %
Copper(USD/MT)	5,788	0.3 %	(0.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	0.1 %	(0.5) %

Global Economy: China's May exports rose 1.1% from a year earlier, though the pace of imports stayed weak. Exports had seen a contraction of 2.7% in April. China's May imports fell by 8.5% though, recording the sharpest drop since July 2016, leaving the country with a trade surplus of \$41.65 billion for the month. Overall, China's exports rose by 6.1% on a yearly basis, while imports rose by 1.8% in the first five months this year. China's trade surplus with the United States widened to a four-month high of \$26.89 billion in May. China's foreign exchange reserves increased in May after falling a month ago, data from the People's Bank of China showed Monday. Foreign exchange reserves rose by \$6 billion to \$3.101 trillion in May. The global economic recovery is supported by the continuation of accommodative financial conditions, stimulus measures taking effect in some countries, and one-off factors dissipating, the Group of 20 Finance Chiefs noted in a statement over the weekend. The UK economy contracted for the second straight month in April on weak manufacturing, data from the Office for National Statistics showed Monday. Gross domestic product fell 0.4% on a monthly basis after easing 0.1% in March. In three months to April, GDP grew at 0.3% after rising 0.5% in the first quarter. In April, UK industrial production declined for the first time this year on sharp fall in manufacturing. Production decreased 2.7% month-on-month, reversing a 0.7% rise in March.

Global Equities: Sentiments stayed supported at the start of week as poor US nonfarm payrolls data spurred hopes of a rate cut from the US Fed. Traders also focused on the fact that the global trade worries might be easing at least on the US-Mexico front.

Indian Economy: The basic exemption limit for an individual income tax payee should be raised to Rs 5 lakh from Rs 2.50 lakh at present, in the backdrop of the inflationary impact over the years, the ASSOCHAM has proposed in its pre-Budget memorandum to the Government. The India Meteorological Department (IMD) said in a latest update that South-west Monsoon has set in over Kerala though the slight delay in the arrival of the rains has pushed the country's rainfall deficiency in the first nine days of June to 45%. The country received only 17.7 mm of rainfall as against the normal precipitation of 32.4 mm, which comes to around 45%, IMD noted. The Confederation Of Indian Industry (CII) has called for multi-stakeholder consultations across the value chain for Electric Vehicles with a special focus on affordability of consumers as India embarks on one of its strategic goals of transportation transition driven by energy choices.

Equity Markets: Local stocks ended with modest gains on first trading day of the week supported by positive global stocks. Investors concerns eased after the United States and Mexico struck a migration deal last week to avert a tariff war. Moreover, a weak US jobs data boosted hopes of interest rate cuts by the Federal Reserve.

Corporate News: Reliance Industries (RIL) is planning to shut down one of the crude distillation units and coker unit of its DTA refinery at Jamnagar for routine maintenance and inspection activities, for about three to four weeks starting from 20 June 2019. The other crude distillation and secondary processing units are expected to operate normally during this period. Wipro has announced the roll-out of Total Operations System (TOPS) CREW, a fully-integrated IT product suite for global airlines. It has been developed jointly by Wipro and Qatar Airways in a co-investment model which helps in increasing the safety awareness, efficiency and profitability of airline operations. Top domestic car maker Maruti Suzuki India (MSI) has cut vehicle production by over 18% in May. It is the company's fourth consecutive month of taking a production cut. UltraTech Cement got environment ministry's nod for a Rs 2,500 crore project in Andhra Pradesh, as per an official document.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(55.5)	19.2	98.3
MF(INR cr)	79.7	(312.0)	(15.2)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,902	34,966	35,305
F&O(INR cr)	948,238	1,406,331	1,198,552

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	16.8	15.1
NSE VIX	15.0	15.4	21.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,034	(0.1) %	2.3 %	Energy	16,125	(0.7) %	(2.5) %
IT	16,362	1.6 %	3.3 %	Pharma	8,247	0.8 %	(12.0) %
Metals	2,912	0.2 %	(6.1) %	Finance	13,448	(0.1) %	7.6 %
Auto	8,217	0.3 %	(2.3) %	PSU	3,060	(1.5) %	(9.6) %
FMCG	30,361	1.3 %	0.6 %	Real Estate	280	0.3 %	4.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Motherson	119	3.9 %	(22.5) %	Vodafone I	13	(4.5) %	(27.9) %
Britannia	2,994	3.3 %	(1.8) %	B P C L	390	(3.3) %	(0.6) %
Tech Mahin	768	2.3 %	(2.2) %	Yes Bank	136	(2.9) %	(50.7) %
United Bre	1,340	2.3 %	(5.2) %	Bank of Ba	118	(2.8) %	(11.1) %
TCS	2,232	2.3 %	9.8 %	Coal India	259	(2.4) %	9.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (MAY)	11-06-2019	1:30	AUD	-	3
NAB Business Confidence (MAY)	11-06-2019	1:30	AUD	-	0
RBA's Kent Speaks in Melbourne	11-06-2019	23:25	AUD	-	-
ANZ Roy Morgan Weekly Consumer Confidence Index (JUN 9)	11-06-2019	23:30	AUD	-	116.9
Euro-Zone Sentix Investor Confidence (JUN)	11-06-2019	8:30	EUR	-	5.3
Average Weekly Earnings (3M/YoY) (APR)	11-06-2019	8:30	GBP	-	0.032
Claimant Count Rate (MAY)	11-06-2019	8:30	GBP	-	0.03
Employment Change 3M/3M (APR)	11-06-2019	8:30	GBP	-	-
ILO Unemployment Rate 3Mths (APR)	11-06-2019	8:30	GBP	-	0.038
Jobless Claims Change (MAY)	11-06-2019	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (APR)	11-06-2019	8:30	GBP	-	0.033
BOE's Saunders, Broadbent speak in Parliament.	11-06-2019	9:00	GBP	-	-
BOE's Tenreiro speaks at Conference in Lisbon	11-06-2019	9:00	GBP	-	-
Japan Manpower Survey (3Q)	11-06-2019	0:01	JPY	-	27
Domestic Corporate Goods Price Index (MoM) (MAY)	11-06-2019	23:50	JPY	-	0.003
Domestic Corporate Goods Price Index (YoY) (MAY)	11-06-2019	23:50	JPY	-	0.012
Machine Orders (MoM) (APR)	11-06-2019	23:50	JPY	-	0.038
Machine Orders (YoY) (APR)	11-06-2019	23:50	JPY	-	(0.007)
Machine Tool Orders (YoY) (MAY P)	11-06-2019	6:00	JPY	-	(0.334)
Industrial Production NSA (YoY) (APR)	11-06-2019	13:00	MXN	-	(0.001)
Card Spending Retail (MoM) (MAY)	11-06-2019	22:45	NZD	-	0.006
Net Migration s.a. (APR)	11-06-2019	22:45	NZD	-	5020
NZ Card Spending (MoM) (MAY)	11-06-2019	22:45	NZD	-	0.004
NFIB Small Business Optimism (MAY)	11-06-2019	10:00	USD	-	103.5
PPI Ex Food, Energy, Trade (MoM) (MAY)	11-06-2019	12:30	USD	-	0.004
PPI Ex Food, Energy, Trade (YoY) (MAY)	11-06-2019	12:30	USD	-	0.022
PPI Final Demand (YoY) (MAY)	11-06-2019	12:30	USD	-	0.022
Producer Price Index Ex Food and Energy (MoM) (MAY)	11-06-2019	12:30	USD	-	0.001
Producer Price Index Ex Food and Energy (YoY) (MAY)	11-06-2019	12:30	USD	-	0.024



Producer Price Index Final Demand (MoM) (MAY)	11-06-2019	12:30	USD	-	0.002
U.S. to Sell USD38 Bln 3-Year Notes	11-06-2019	17:00	USD	-	-

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