



11 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,954	0.1 %	7.3 %
BSE SENSEX	36,240	0.8 %	9.1 %
CNX BANK	26,918	0.1 %	10.6 %
CNX MIDCAP	18,697	0.3 %	(2.1) %
CNX SMALLCAP	7,458	0.2 %	(5.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,920	0.6 %	0.4 %
S&P 500	2,794	0.4 %	3.6 %
FTSE 100	7,692	0.1 %	0.6 %
HANG SENG	28,682	(0.0) %	(6.0) %
NIKKEI	22,197	0.7 %	(5.6) %
SHANGHAI COMPOSITE	2,828	0.4 %	(15.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.82	(0.1) %	8.1 %
EUR/USD	1.17	(0.1) %	(2.3) %
GBP/USD	1.33	(0.1) %	(1.8) %
USD/JPY	110.93	0.4 %	(1.6) %
USD/AUD	1.35	0.2 %	5.5 %
USD/SGD	1.36	0.2 %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	74	0.4 %	22.8 %
Gold(INR/10g)	30,399	(0.7) %	3.5 %
Gold Comex(USD/oz)	1,252	(0.7) %	(4.4) %
SILVER(INR/1Kg)	39,150	(1.1) %	1.4 %
Aluminium(USD/MT)	2,141	0.2 %	(5.1) %
Copper(USD/MT)	6,308	(1.2) %	(12.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

Global Economy: German investor confidence to its lowest level in nearly six years in July, survey data from the Centre for European Economic Research showed Tuesday. The ZEW Indicator of Economic Sentiment for Germany dropped 8.6 points to minus 24.7 points, which was the lowest reading since August 2012, the Mannheim-based think tank said. Eurozone house prices rose at a faster pace in the three months ended March, Eurostat reported Tuesday. House prices climbed 4.5% year-over-year in the first quarter, following a 4.3% rise in the previous quarter. Japan core machine orders dropped 3.7 percent on month in May coming in at 907.9 billion yen, the Cabinet Office said on Wednesday, following the 10.1% surge in April. On a yearly basis, machine orders surged 16.5%, following the 9.6% jump in the previous month.

Global Equities: US markets extended gains and the S&P 500 hit its best closing level in five months on sustained buying.

Indian Economy: Domestic passenger vehicle sales edged up 37.54 percent to 2,73,759 units in June this year from while car sales were up 34.21 percent at 1,83,885 units according to data released by the Society of Indian Automobile Manufacturers (SIAM). The domestic automobile industry produced a total 8,064,239 vehicles including passenger vehicles, commercial vehicles, three wheelers, two wheelers and quadricycle in April-June 2018 as against 6,919,414 in April-June 2017, registering a growth of 16.55 percent over the same period last year. The sales of Passenger Vehicles grew by 19.91 percent in April-June 2018 over the same period last year.

Equity Markets: Domestic bourses logged strong gains on positive global stocks. The barometer index, the S&P BSE Sensex, rose 304.90 points or 0.85% to settle at 36,239.62. The Nifty 50 index rose 94.35 points or 0.87% to settle at 10,947.25. Investors shifted focus to upcoming corporate earnings and put global trade concerns aside. The Sensex settled well above the psychological 36,000 mark after regaining that level in opening trade.

Corporate News: IT major TCS' consolidated net income rose 6.3% to Rs 7340 crore on 6.8% increase in revenue to Rs 34261 crore in Q1 June 2018 over Q4 March 2018. Commenting on the Q1 performance, CEO and MD, Rajesh Gopinathan said the company is starting the new fiscal year on a strong note, with the growth engine firing on all cylinders. The firm's banking vertical recovered very nicely this quarter, while other industry verticals maintained their momentum. With a good set of wins during the quarter, a robust deal pipeline and accelerating digital demand, TCS is positioned well for the future. Axis Bank said that its board has recommended the names of three candidates, in order of preference, for the approval of the RBI. The candidate as approved by the RBI, will succeed Shikha Sharma, whose term as the managing director & CEO of the bank, is due to expire on 31 December 2018. Shalimar Paints said that its board approved the draft letter of offer of the company and related documents in respect of the proposed rights issue not exceeding an amount of Rs 240 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(171.0)	(19.7)	(41.8)
MF(INR cr)	37.8	196.4	477.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,974	28,739	32,615
F&O(INR cr)	586,441	718,207	825,357

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.6	14.5	15.2
NSE VIX	12.4	12.7	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,895	0.5 %	10.5 %	Energy	13,750	1.9 %	3.5 %
IT	14,223	0.8 %	11.9 %	Pharma	9,276	(0.3) %	7.6 %
Metals	3,422	1.7 %	(3.3) %	Finance	11,191	0.9 %	9.1 %
Auto	11,239	0.9 %	1.6 %	PSU	2,846	1.1 %	(0.3) %
FMCG	29,715	0.4 %	12.1 %	Real Estate	274	1.8 %	(7.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Shriram Tr	1,206	5.7 %	(17.9) %	Cadila Hea	381	(1.8) %	(1.0) %
GAIL (Indi)	364	4.8 %	12.1 %	H P C L	268	(1.6) %	(22.1) %
Bharat Ele	113	4.7 %	(22.1) %	I O C L	155	(1.3) %	(8.9) %
DLF	194	3.8 %	(3.3) %	IndusInd B	1,935	(1.2) %	7.2 %
Havells In	574	3.7 %	13.1 %	Bosch	17,842	(1.1) %	(3.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (JUL)	11-07-2018	0:30	AUD	-	102.1
Westpac Consumer Confidence (JUL)	11-07-2018	0:30	AUD	-	0.003
Home Loans (MoM) (MAY)	11-07-2018	1:30	AUD	-	(0.014)
Investment Lending (MAY)	11-07-2018	1:30	AUD	-	(0.009)
Value of Loans (MoM) (MAY)	11-07-2018	1:30	AUD	-	0.002
Bank of Canada Rate Decision (JUL 11)	11-07-2018	14:00	CAD	-	0.0125
ECB's Mersch Chairs conference Session in Frankfurt	11-07-2018	12:00	EUR	-	-
ECB President Draghi Speaks in Frankfurt	11-07-2018	7:00	EUR	-	-
ECB's Praet Chairs Conference Session in Frankfurt	11-07-2018	7:30	EUR	-	-
BOE Governor Mark Carney Speaks in Boston, Massachusetts	11-07-2018	15:35	GBP	-	-
RICS House Price Balance (JUN)	11-07-2018	23:01	GBP	-	(0.03)
BOJ Outright Bond Purchase 1~3 Years	11-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	11-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	11-07-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (JUL 06)	11-07-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUL 06)	11-07-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 06)	11-07-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 06)	11-07-2018	23:50	JPY	-	-
Tertiary Industry Index (MoM) (MAY)	11-07-2018	4:30	JPY	-	0.01
Food Prices (MoM) (JUN)	11-07-2018	22:45	NZD	-	0
MBA Mortgage Applications (JUL 06)	11-07-2018	11:00	USD	-	(0.005)
PPI Ex Food, Energy, Trade (MoM) (JUN)	11-07-2018	12:30	USD	-	0.001
PPI Ex Food, Energy, Trade (YoY) (JUN)	11-07-2018	12:30	USD	-	0.026
PPI Final Demand (YoY) (JUN)	11-07-2018	12:30	USD	-	0.031
Producer Price Index Ex Food and Energy (MoM) (JUN)	11-07-2018	12:30	USD	-	0.003
Producer Price Index Ex Food and Energy (YoY) (JUN)	11-07-2018	12:30	USD	-	0.024
Producer Price Index Final Demand (MoM) (JUN)	11-07-2018	12:30	USD	-	0.005
Wholesale Inventories (MoM) (MAY F)	11-07-2018	14:00	USD	-	0.005
Wholesale Trade Sales (MoM) (MAY)	11-07-2018	14:00	USD	-	0.009



DOE Cushing OK Crude Inventory (JUL 06)	11-07-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUL 06)	11-07-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUL 06)	11-07-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 06)	11-07-2018	14:30	USD	-	-
U.S. to Sell USD22 Bln 10-Year Notes Reopening	11-07-2018	17:00	USD	-	-
Fed's Williams Speaks with Community Leaders in Brooklyn	11-07-2018	20:30	USD	-	-

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