



11 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,438	0.0 %	12.0 %
BSE SENSEX	37,922	(1.2) %	14.3 %
CNX BANK	27,202	0.0 %	11.8 %
CNX MIDCAP	19,242	0.0 %	0.8 %
CNX SMALLCAP	7,428	0.0 %	(6.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,857	(0.2) %	4.2 %
S&P 500	2,877	0.2 %	6.7 %
FTSE 100	7,279	0.0 %	(4.8) %
HANG SENG	26,613	(1.3) %	(12.8) %
NIKKEI	22,373	0.3 %	(4.8) %
SHANGHAI COMPOSITE	2,669	(1.2) %	(20.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.44	0.6 %	13.8 %
EUR/USD	1.16	(0.3) %	(3.5) %
GBP/USD	1.30	0.8 %	(3.6) %
USD/JPY	111.40	0.8 %	(1.2) %
USD/AUD	1.41	1.0 %	10.0 %
USD/SGD	1.38	0.3 %	3.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(0.0) %	12.2 %
Gold(INR/10g)	30,402	0.0 %	3.6 %
Gold Comex(USD/oz)	1,202	(0.4) %	(8.2) %
SILVER(INR/1Kg)	36,389	0.0 %	(5.7) %
Aluminium(USD/MT)	2,030	(0.0) %	(10.0) %
Copper(USD/MT)	5,883	(1.0) %	(18.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.1 %	0.5 %

Global Economy: Eurozone investor confidence index fell to 12 in September from 14.7 in August, survey data from think tank Sentix showed. Due to the solid US dollar and political crises, the emerging markets are in the crossfire. The weakness of the emerging markets, especially in Asia and Latin America, is weighing on economic assessments. But also home-made European problems, Sentix said. The current situation index declined to a 3-month low of 35 in September from 37.3 a month ago. UK industrial production advanced 0.1% in July from June due primarily to a rise in mining and quarrying of 3.3%, the Office for National Statistics reported. Oil and gas extraction returned to production, following planned maintenance in June. Meanwhile, manufacturing output contracted 0.2%, reversing a 0.4% rise in June. On a yearly basis, growth in industrial production eased to 0.9% from 1.1% in June.

Global Equities: Stocks started the week in a tentative manner amid rising anxiety about the US-China trade war. Beijing has warned of retaliation if Washington launches any new trade measures.

Equity Markets: Domestic stocks dropped sharply tracking negative global cues as fears of a potentially major escalation in the Sino-US trade conflict weighed on investor sentiment, while the rupee depreciated to a fresh low, bolstering inflation concerns. The Sensex ended below the psychologically important 38,000 mark after moving above and below that level in intraday trade.

Indian Economy: The Indian real estate sector has witnessed transformative reforms in the last few years, the Union Minister of State (I/C) Housing and Urban Affairs, Hardeep Singh Puri said in a latest speech. According to CREDAI-JLL report, the contribution of housing sector to the Indian GDP is expected to be 11% by 2020, up from current 5 to 6%. The Indian insurance industry is expected to grow to USD 280 billion by FY 2020 with the government's flagship Ayushman Bharat - the National Health Protection Mission (AB-NHPM) and other growth drivers like rising disposable incomes, presence of global players and easing of the regulatory regime, helping penetration of the insurance culture in the country, according to an ASSOCHAM-APAS study.

Corporate News: ArcelorMittal confirms that it has submitted a revised proposal to Essar Steel's Committee of Creditors for the acquisition of ESIL, according ArcelorMittal said in a statement. Manali Petrochemicals announced that the company will launch the products of its Wholly Owned Subsidiary Notedome, UK, manufactured at the facilities of the Company in Chennai during September 2018. MEP Infrastructure Developers announced that ICRA has assigned the short term rating of ICRA A3+ for the bank limit of Rs 50 crore. Indian Wood Products Company has received the license to establish and operate in the State of Jammu and Kashmir from the Conservator of Forrest, East Circle Jammu. The weakness in the rupee persisted on Monday, as the Indian unit plunged nearly 1% on rising crude prices, strengthening dollar and a widening current account deficit, testing a fresh low of 72.70 per dollar. Private airlines SpiceJet inaugurated its first cargo aircraft. Inaugurated by Minister of State for Civil Aviation Jayant Sinha, the SpiceXpress will launch its operations on September 18.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	19.2	57.2	(23.2)
MF(INR cr)	604.4	366.3	365.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,503	39,297	34,079
F&O(INR cr)	801,491	1,108,154	904,718

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.9	13.9	14.3
NSE VIX	15.2	13.9	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,202	(1.0) %	11.8 %	Energy	15,676	(1.6) %	17.9 %
IT	16,105	0.0 %	26.7 %	Pharma	10,447	(2.0) %	21.2 %
Metals	3,637	(1.7) %	2.7 %	Finance	11,340	(1.4) %	10.5 %
Auto	10,844	(1.7) %	(1.9) %	PSU	3,068	(2.2) %	7.5 %
FMCG	30,812	(1.7) %	16.3 %	Real Estate	264	(1.5) %	(10.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
A B B	1,374	2.0 %	6.3 %	Havells In	641	(4.8) %	26.3 %
Power Fin.	88	1.8 %	1.4 %	Bajaj Fin.	2,616	(4.7) %	43.8 %
Vodafone I	48	1.8 %	(38.6) %	Indiabulls	1,161	(4.2) %	(6.6) %
HCL Techno	1,089	1.4 %	11.1 %	L&T Fin.Ho	161	(4.2) %	0.4 %
Axis Bank	652	1.0 %	30.6 %	Sun Pharma	638	(4.0) %	25.6 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Australia Manpower Survey (4Q)	11-09-2018	0:01	AUD	-	0.08
NAB Business Conditions (AUG)	11-09-2018	1:30	AUD	-	12
NAB Business Confidence (AUG)	11-09-2018	1:30	AUD	-	7
RBA's Holloway Speech in Sydney	11-09-2018	23:10	AUD	-	-
Housing Starts (AUG)	11-09-2018	12:15	CAD	-	-
Riksbank's Governor Ingves Gives Speech in London	11-09-2018	11:45	CHF	-	-
Riksbank's Ingves in London Roundtable	11-09-2018	7:15	CHF	-	-
Manpower Survey (4Q)	11-09-2018	0:01	CNY	-	0.1
ECB's Nouy Speaks in Strasbourg, France	11-09-2018	12:00	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (SEP)	11-09-2018	9:00	EUR	-	(11.1)
German ZEW Survey Current Situation (SEP)	11-09-2018	9:00	EUR	-	72.6
German ZEW Survey Expectations (SEP)	11-09-2018	9:00	EUR	-	(13.7)
Average Weekly Earnings (3M/(YoY)) (JUL)	11-09-2018	8:30	GBP	-	0.024
Claimant Count Rate (AUG)	11-09-2018	8:30	GBP	-	0.025
Employment Change 3M/3M (JUL)	11-09-2018	8:30	GBP	-	-
ILO Unemployment Rate 3Mths (JUL)	11-09-2018	8:30	GBP	-	0.04
Jobless Claims Change (AUG)	11-09-2018	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/(YoY)) (JUL)	11-09-2018	8:30	GBP	-	0.027
Japan Manpower Survey (4Q)	11-09-2018	0:01	JPY	-	26
BSI All Industry (QoQ) (3Q)	11-09-2018	23:50	JPY	-	(3.2)
BSI Large Manufacturing (QoQ) (3Q)	11-09-2018	23:50	JPY	-	(3.2)
Tertiary Industry Index (MoM) (JUL)	11-09-2018	4:30	JPY	-	(0.005)
Machine Tool Orders (YoY) (AUG P)	11-09-2018	6:00	JPY	-	0.131
Industrial Production NSA (YoY) (JUL)	11-09-2018	13:00	MXN	-	0.002
New Zealand Manpower Survey (4Q)	11-09-2018	0:01	NZD	-	0.07
NFIB Small Business Optimism (AUG)	11-09-2018	10:00	USD	-	107.9
JOLTS Job Openings (JUL)	11-09-2018	14:00	USD	-	6662
Wholesale Inventories (MoM) (JUL F)	11-09-2018	14:00	USD	-	0.007
Wholesale Trade Sales (MoM) (JUL)	11-09-2018	14:00	USD	-	(0.001)



U.S. to Sell 4-Week Bills (SEP 11)	11-09-2018	15:30	USD	-	-
U.S. to Sell 52-Week Bills (SEP 11)	11-09-2018	15:30	USD	-	-
U.S. to Sell 3-Year Notes (SEP 11)	11-09-2018	17:00	USD	-	-

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