



11 Oct.2019

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D    | % YTD    |
|----------------|--------|---------|----------|
| CNX NIFTY      | 11,320 | 0.8 %   | (3.0) %  |
| BSE SENSEX     | 37,880 | (0.8) % | (1.8) %  |
| CNX BANK       | 28,479 | 1.7 %   | (6.1) %  |
| CNX MIDCAP     | 15,632 | 0.6 %   | (14.7) % |
| CNX SMALLCAP   | 5,406  | 0.7 %   | (19.8) % |

| GLOBAL INDICES     | LATEST | % 1D  | % YTD  |
|--------------------|--------|-------|--------|
| DOW JONES          | 26,497 | 0.6 % | 13.6 % |
| S&P 500            | 2,938  | 0.6 % | 17.2 % |
| FTSE 100           | 7,186  | 0.3 % | 6.7 %  |
| HANG SENG          | 25,708 | 0.1 % | 2.3 %  |
| NIKKEI             | 21,552 | 0.5 % | 10.2 % |
| SHANGHAI COMPOSITE | 2,948  | 0.8 % | 19.6 % |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 70.76  | 0.0 %   | 1.9 %   |
| EUR/USD | 1.10   | 0.3 %   | (3.9) % |
| GBP/USD | 1.23   | (0.1) % | (3.5) % |
| USD/JPY | 107.66 | 0.6 %   | (1.8) % |
| USD/AUD | 1.48   | (0.2) % | 4.2 %   |
| USD/SGD | 1.38   | (0.3) % | 0.9 %   |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 53     | (0.1) % | 13.0 %  |
| Gold(INR/10g)      | 38,361 | 0.5 %   | 21.7 %  |
| Gold Comex(USD/oz) | 1,510  | (0.0) % | 17.0 %  |
| SILVER(INR/1Kg)    | 45,727 | 0.1 %   | 19.5 %  |
| Aluminium(USD/MT)  | 1,729  | (0.2) % | (6.9) % |
| Copper(USD/MT)     | 5,660  | 0.2 %   | (3.1) % |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.6    | 0.1 %  | (1.0) % |

**Global Economy:** The US Labor Department said its consumer price index was unchanged in September after inching up by 0.1% in August. WTO's World Trade Report highlighted that services have become the most dynamic component of international trade and that its role will continue to expand in the coming decades. It stresses the need to enhance cooperation in the international community to support this expansion. Germany's exports declined the most in four months in August, while imports recovered at a faster than expected pace, data from Destatis revealed on Thursday. Exports fell by 1.8% month-on-month in August, reversing a 0.8% rise in July. Meanwhile, imports rose 0.5% after falling 2.4% a month ago. As a result, the trade surplus fell to a seasonally adjusted EUR 18.1 billion from EUR 20.5 billion in July. UK economy expanded in three months to August for the second consecutive time. Rolling three-month gross domestic product growth increased to 0.3% from 0.1% in three months to July. Japan core machine orders fell a seasonally adjusted 2.4% on month in August, the Cabinet Office said on Thursday standing at 875.3 billion yen, following the 6.6% decline in July. On a yearly basis, core machine orders plummeted 14.5% following the 0.3% gain in the previous month. Total number of home loans in Australia was up a seasonally adjusted 3.2% on month in August, the Australian Bureau of Statistics said on Thursday - coming in at 33,468. That followed the upwardly revised 4.3% increase in July.

**Global Equities:** US stocks gained after President Donald Trump revealed he plans to meet with Chinese Vice Premier Liu He as part of high-level US-China trade talks.

**Indian Economy:** Indian Railway (IR) has recorded decline in its overall revenues for second straight month and at 38-months high pace of 4.2% to Rs 13169.20 crore in September 2019 over September 2018. The IR revenues had moved up 10.5% to Rs 13740.55 crore in September 2018. Freight loading of the Indian Railways has declined for second straight month at record high pace of 6.6% in September 2019 over September 2018, since we have data for last 166 months. Also, the monthly freight loading has dipped to 36-months low level of 88.55 million tonnes (mt) in September 2019. The freight revenue also declined for second straight month at 4.4% to Rs 8716.34 crore in September 2019. Southwest monsoon has further withdrawn from most parts of Punjab, entire Haryana including Chandigarh & Delhi, some parts of Uttarakhand, some parts of Uttar Pradesh, West Madhya Pradesh, East Rajasthan and most parts of West Rajasthan. Gems and jewellery exports dropped 7% to \$12.4 billion during April-August 2019-20 on account of slowdown in demand in major developed markets, according to data from the Gems and Jewellery Export Promotion Council (GJEPC).

**Equity Markets:** Key equity benchmarks declined on Thursday, dragged by selling in banks stocks. Investors were cautious ahead of earnings reports from major IT services companies. A bout of volatility was observed amid weekly index options expiry on NSE. BSE Sensex fell 297.55 points or 0.78% to 37,880.40. The Nifty 50 index fell 78.75 points or 0.70% to 11,234.55.

**Corporate News:** IT major Tata Consultancy Services (TCS) reported a constant currency revenue growth of 8.4% year-on-year for the quarter ending September 30, 2019. TCS announced a dividend of Rs 45 per share, including special dividend of Rs 40 per share. TCS reported an operating margin of 24% and CEO Rajesh Gopinathan said its Q2 order book was the highest in the last six quarters. IT major Infosys will announce its Q2 result today, 11 October 2019. Biocon and Evotec SE announced that Biocon Biologics, a wholly owned subsidiary of Biocon, and Just - Evotec Biologics, wholly owned by Evotec, have entered into a strategic licensing agreement for an early-stage, pre-clinical biosimilar asset.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (96.0)        | (128.9)    | 5.3        |
| MF(INR cr)  | 884.0         | 632.8      | 421.1      |

### 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)  | 2,559,669     | 1,767,998      | 1,347,423      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0          | 18.2           | 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  | 28,013        | (2.7) %     | (7.6) %      | Energy      | 15,579        | 0.7 %       | (5.8) %      |
| IT     | 15,094        | (0.2) %     | (4.7) %      | Pharma      | 7,236         | 0.0 %       | (22.8) %     |
| Metals | 2,283         | (1.5) %     | (26.4) %     | Finance     | 12,722        | (1.9) %     | 1.8 %        |
| Auto   | 7,360         | (1.4) %     | (12.5) %     | PSU         | 2,152         | (2.9) %     | (36.4) %     |
| FMCG   | 30,147        | (0.4) %     | (0.2) %      | Real Estate | 245           | (2.1) %     | (8.3) %      |

### 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             | 6.0 %       | (65.1) %     | Indiabulls        | 195           | (18.5) %    | (76.9) %     |
| Bandhan Ba         | 507           | 5.4 %       | (4.4) %      | IndusInd B        | 1,229         | (6.1) %     | (29.5) %     |
| Bharti Air         | 377           | 5.0 %       | 20.6 %       | Yes Bank          | 41            | (5.3) %     | (85.2) %     |
| Berger Pai         | 469           | 4.3 %       | 42.2 %       | New India         | 98            | (4.1) %     | (48.1) %     |
| Grasim Ind         | 697           | 3.9 %       | (18.7) %     | Shriram Tr        | 1,082         | (3.7) %     | (12.5) %     |

### EVENTS CALENDAR

| <i>EVENT</i>         | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| <b>No Data Found</b> |             |                  |               |               |                       |

..... End of Report .....