



12 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,026	0.7 %	8.0 %
BSE SENSEX	36,266	0.1 %	9.8 %
CNX BANK	27,072	1.0 %	11.3 %
CNX MIDCAP	18,678	0.7 %	(2.2) %
CNX SMALLCAP	7,474	0.9 %	(5.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,700	(0.9) %	(0.5) %
S&P 500	2,774	(0.7) %	2.9 %
FTSE 100	7,592	(1.3) %	(0.7) %
HANG SENG	28,312	(1.3) %	(7.2) %
NIKKEI	21,932	(1.2) %	(6.7) %
SHANGHAI COMPOSITE	2,778	(1.8) %	(17.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.77	0.1 %	8.0 %
EUR/USD	1.17	(0.6) %	(2.8) %
GBP/USD	1.32	(0.4) %	(2.4) %
USD/JPY	112.26	1.1 %	(0.4) %
USD/AUD	1.36	1.4 %	6.1 %
USD/SGD	1.36	0.7 %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	(5.0) %	16.6 %
Gold(INR/10g)	30,403	0.0 %	3.6 %
Gold Comex(USD/oz)	1,244	(0.6) %	(5.0) %
SILVER(INR/1Kg)	39,060	(0.2) %	1.2 %
Aluminium(USD/MT)	2,121	(0.9) %	(6.0) %
Copper(USD/MT)	6,182	(2.0) %	(13.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Producer prices in the US increased, with the annual rate of price growth accelerating to its highest level in over six years. The Labor Department said its producer price index for final demand rose by 0.3% in June after rising by 0.5% in May. Japan's tertiary activity index inched up 0.1% month-over-month in May, following a 1% rise in April, data from the Ministry of Economy, Trade and Industry showed Wednesday. Among the individual components of the survey, activity was up for wholesale trade, medical, health care and welfare, information and communications, transport and postal activities, finance and insurance and business-related services.

Global Equities: Stocks dropped after the Trump administration announced it plans to slap tariffs on a further \$200 billion of Chinese imports.

Indian Economy: The US Climate Prediction Centre (CPC) has stated that the enhanced monsoon activity would continue over Central India and South-East Asia, with the monsoon trough extending right into the North-West Pacific. The monsoon would stay strong during the ongoing week at least until July 17th, the CPC said in its latest update. Strong monsoon conditions, which extend into the North-West Pacific, saw the initiation, growth and propagation of typhoon Maria over the West Pacific as a Category-3 storm.

Equity Markets: Local stocks settled almost flat after a volatile trading session. The key benchmark indices reversed initial losses triggered by negative Asian stocks. Indices extended gains in morning trade. Fresh selling at higher levels once again pulled the key benchmark indices in negative zone in mid-morning trade. Indices once again regained positive zone in early afternoon trade. Indices pared gains and were trading almost flat in afternoon trade. Stocks extended gains and hit fresh intraday high in mid-afternoon trade.

Corporate News: India has become the world's sixth largest economy, surpassing France into seventh place, according to updated World Bank figures for the year 2017. India's gross domestic product (GDP) amounted to \$2.597 trillion at the end of last year, against \$2.582 trillion for France. The World Bank has projected India's GDP growth at 7.3% in FY2018-19. In a recent update, the bank noted that growth in India is projected to accelerate to 7.3% in FY2018-19 and 7.5% on an average in 2019-20. Omaxe has executed a Concession Agreement with North Delhi Municipal Corporation on 10 July 2018 for the redevelopment / reconstruction of Multi level car parking at Gandhi Maidan, Delhi. Telecom Commission has approved the new telecom policy and net neutrality recommendations, among other proposals. Tata Power Renewable Energy (TPREL) has bagged an order from Karnataka to develop 250 MW solar project in the state's Tumkur district.



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)	33,128	29,288	32,622
F&O(INR cr)	790,508	727,244	824,873

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.6	14.4	15.2
NSE VIX	12.8	12.7	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,816	(0.3) %	10.2 %	Energy	13,796	0.3 %	3.8 %
IT	14,536	2.2 %	14.4 %	Pharma	9,229	(0.5) %	7.1 %
Metals	3,317	(3.1) %	(6.3) %	Finance	11,153	(0.3) %	8.7 %
Auto	11,127	(1.0) %	0.6 %	PSU	2,792	(1.9) %	(2.2) %
FMCG	29,803	0.3 %	12.5 %	Real Estate	274	0.1 %	(7.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
TCS	1,980	5.6 %	36.1 %	UPL	603	(5.3) %	(19.8) %
Godrej Con	1,324	5.5 %	18.7 %	Coal India	265	(4.9) %	(4.6) %
Bharti Inf	317	3.9 %	(6.1) %	SAIL	77	(4.6) %	6.0 %
Bajaj Auto	3,162	2.2 %	12.6 %	Motherson	293	(4.6) %	(9.6) %
Hind. Unil	1,718	1.8 %	27.1 %	Bharat Ele	108	(4.0) %	(25.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JUL)	12-07-2018	1:00	AUD	-	0.042
New Housing Price Index (MoM) (MAY)	12-07-2018	12:30	CAD	-	0
New Housing Price Index (YoY) (MAY)	12-07-2018	12:30	CAD	-	0.016
Teranet/National Bank HP Index (JUN)	12-07-2018	12:30	CAD	-	221.73
Teranet/National Bank HPI (MoM) (JUN)	12-07-2018	12:30	CAD	-	0.01
Teranet/National Bank HPI (YoY) (JUN)	12-07-2018	12:30	CAD	-	0.045
German Consumer Price Index (MoM) (JUN F)	12-07-2018	6:00	EUR	-	0.001
German Consumer Price Index (YoY) (JUN F)	12-07-2018	6:00	EUR	-	0.021
Euro-Zone Industrial Production s.a. (MoM) (MAY)	12-07-2018	9:00	EUR	-	(0.009)
Euro-Zone Industrial Production w.d.a. (YoY) (MAY)	12-07-2018	9:00	EUR	-	0.017
Bank of England Credit Conditions & Bank Liabilities Surveys	12-07-2018	8:30	GBP	-	-
Industrial Production NSA (YoY) (MAY)	12-07-2018	13:00	MXN	-	0.038
BusinessNZ Manufacturing PMI (JUN)	12-07-2018	22:30	NZD	-	54.5
Consumer Price Index (MoM) (JUN)	12-07-2018	12:30	USD	-	0.002
Consumer Price Index (YoY) (JUN)	12-07-2018	12:30	USD	-	0.028
Consumer Price Index Core Index s.a. (JUN)	12-07-2018	12:30	USD	-	256.889
Consumer Price Index Ex Food and Energy (MoM) (JUN)	12-07-2018	12:30	USD	-	0.002
Consumer Price Index Ex Food and Energy (YoY) (JUN)	12-07-2018	12:30	USD	-	0.022
Consumer Price Index n.s.a. (JUN)	12-07-2018	12:30	USD	-	251.588
Continuing Claims (JUN 30)	12-07-2018	12:30	USD	-	-
Fed's Kashkari Speaks on Panel Discussing Immigration	12-07-2018	12:30	USD	-	-
Initial Jobless Claims (JUL 07)	12-07-2018	12:30	USD	-	-
Real Avg Hourly Earning (YoY) (JUN)	12-07-2018	12:30	USD	-	0
Real Avg Weekly Earnings (YoY) (JUN)	12-07-2018	12:30	USD	-	0.003
EIA Natural Gas Storage Change (JUL 06)	12-07-2018	14:30	USD	-	78
EIA Working Natural Gas Implied Flow (JUL 06)	12-07-2018	14:30	USD	-	78
Fed's Harker Speaks at Rocky Mountain Economic Summit	12-07-2018	16:15	USD	-	-
U.S. to Sell USD14 Bln 30-Year Bonds Reopening	12-07-2018	17:00	USD	-	-
Monthly Budget Statement (JUN)	12-07-2018	18:00	USD	-	-



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