



12 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,340	0.5 %	11.0 %
BSE SENSEX	37,413	(1.3) %	12.9 %
CNX BANK	26,895	0.3 %	10.5 %
CNX MIDCAP	19,006	0.1 %	(0.5) %
CNX SMALLCAP	7,319	0.1 %	(7.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,971	0.4 %	4.6 %
S&P 500	2,888	0.4 %	7.1 %
FTSE 100	7,274	(0.1) %	(4.9) %
HANG SENG	26,423	(0.7) %	(13.4) %
NIKKEI	22,665	1.3 %	(3.6) %
SHANGHAI COMPOSITE	2,665	(0.2) %	(20.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.69	1.3 %	14.2 %
EUR/USD	1.16	0.3 %	(3.5) %
GBP/USD	1.30	0.7 %	(3.7) %
USD/JPY	111.48	0.5 %	(1.1) %
USD/AUD	1.41	0.1 %	10.1 %
USD/SGD	1.38	(0.1) %	3.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	2.5 %	14.7 %
Gold(INR/10g)	30,605	0.7 %	4.2 %
Gold Comex(USD/oz)	1,199	(0.1) %	(8.4) %
SILVER(INR/1Kg)	36,682	0.8 %	(5.0) %
Aluminium(USD/MT)	2,035	1.8 %	(9.8) %
Copper(USD/MT)	5,849	0.1 %	(18.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

**Global Economy:** German economic sentiment indicator climbed to -10.6 from -13.7 in August, survey data from the Centre for European Economic Research, or ZEW, showed Tuesday. The current conditions index rose to 76 from 72.6 in August. UK unemployment rate came in at 4 percent in three months to July, data from the Office for National Statistics showed. This was the lowest rate since February 1975. The number of unemployed decreased by 55,000 from three months to April to 1.36 million. Japan's tertiary industry activity index edged up 0.1% on month in July, after declining by revised 0.6% in June, data from the Ministry of Economy, Trade and Industry showed. On a yearly basis, tertiary industry activity advanced 1% in July.

**Global Equities:** Continued worries over US-China trade escalations hurt the sentiments. China is reportedly seeking permission from the World Trade Organization (WTO) to impose trade sanctions on the US.

**Indian Economy:** The domestic automobile industry produced a total 13,701,825 vehicles including passenger vehicles, commercial vehicles, three wheelers, two wheelers and quadricycle in April-August 2018 as against 11,962,983 in April-August 2017, registering a growth of 14.54% over the same period last year, noted the Society of Indian Automobile Manufacturers (SIAM) in a latest update. The sale of Passenger Vehicles grew by 9.81% in April-August 2018 over the same period last year. Within the Passenger Vehicles, the sales for Passenger Cars, Utility Vehicle & Vans grew by 9.71%, 8.67% and 16.05% respectively in April-August 2018 over the same period last year. The passenger vehicle sales dropped 2.46% in August.

**Equity Markets:** A late correction weighed on local stocks yesterday. The domestic market tumbled, extending its sharp fall from the previous session amid bearish global cues. Domestic sentiment also took a hit as the rupee touched a new record low of 72.73 in the afternoon trade. A continued firm undertone in global crude oil prices and weak global cues also impacted the mood on the domestic bourses.

**Corporate News:** HCL Technologies said its Rs 4,000 crore buyback offer will commence on September 18. The company's shareholders had last month approved the buyback proposal. GAIL said it will expand its pipeline network capacity by about 50 per cent by constructing 5,500-kilometers of new lines in the next three years. The National Green Tribunal has directed the departments concerned to conduct an inspection of beverage maker Parle Agro Private Ltd's unit in Uttar Pradesh to ascertain whether the industry is releasing mercury beyond the permissible limit.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(132.6)	25.6	(24.1)
MF(INR cr)	(76.0)	319.4	363.0

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,773	39,222	34,121
F&O(INR cr)	1,262,935	1,130,266	907,860

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.2	13.9	14.3
NSE VIX	15.3	14.1	13.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,808	(1.4) %	10.2 %	Energy	15,477	(1.3) %	16.4 %
IT	15,993	(0.7) %	25.9 %	Pharma	10,279	(1.6) %	19.2 %
Metals	3,578	(1.6) %	1.1 %	Finance	11,186	(1.4) %	9.0 %
Auto	10,681	(1.5) %	(3.4) %	PSU	3,034	(1.1) %	6.3 %
FMCG	30,068	(2.4) %	13.5 %	Real Estate	259	(2.0) %	(12.7) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Cummins In	754	1.3 %	5.3 %	Power Fin.	81	(8.1) %	(6.8) %
Coal India	283	1.3 %	2.0 %	Titan Comp	821	(4.3) %	(13.1) %
A B B	1,391	1.2 %	7.6 %	Bank of Ba	141	(4.2) %	(1.0) %
Oracle Fin	4,193	0.9 %	6.5 %	Container	634	(3.9) %	2.1 %
M & M	943	0.6 %	26.1 %	Godrej Con	1,248	(3.8) %	11.9 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (SEP)	12-09-2018	0:30	AUD	-	103.6
Westpac Consumer Confidence SA (MoM) (SEP)	12-09-2018	0:30	AUD	-	(0.023)
RBA's Thompson Speech in Sydney	12-09-2018	1:00	AUD	-	-
Capacity Utilization Rate (2Q)	12-09-2018	12:30	CAD	-	0.861
Teranet/National Bank HP Index (AUG)	12-09-2018	12:30	CAD	-	225.57
Teranet/National Bank HPI (MoM) (AUG)	12-09-2018	12:30	CAD	-	0.008
Teranet/National Bank HPI (YoY) (AUG)	12-09-2018	12:30	CAD	-	0.018
Riksbank's Governor Ingves at Conference	12-09-2018	8:30	CHF	-	-
Euro-Zone Employment (QoQ) (2Q)	12-09-2018	9:00	EUR	-	0.004
Euro-Zone Employment (YoY) (2Q)	12-09-2018	9:00	EUR	-	0.014
Euro-Zone Industrial Production s.a. (MoM) (JUL)	12-09-2018	9:00	EUR	-	(0.007)
Euro-Zone Industrial Production w.d.a. (YoY) (JUL)	12-09-2018	9:00	EUR	-	0.025
RICS House Price Balance (AUG)	12-09-2018	23:01	GBP	-	0.04
Domestic Corporate Goods Price Index (MoM) (AUG)	12-09-2018	23:50	JPY	-	0.005
Domestic Corporate Goods Price Index (YoY) (AUG)	12-09-2018	23:50	JPY	-	0.031
Machine Orders (MoM) (JUL)	12-09-2018	23:50	JPY	-	(0.088)
Machine Orders (YoY) (JUL)	12-09-2018	23:50	JPY	-	0.003
Food Prices (MoM) (AUG)	12-09-2018	22:45	NZD	-	0.007
MBA Mortgage Applications (SEP 7)	12-09-2018	11:00	USD	-	-
Producer Price Index Ex Food and Energy (MoM) (AUG)	12-09-2018	12:30	USD	-	0.001
Producer Price Index Ex Food and Energy (YoY) (AUG)	12-09-2018	12:30	USD	-	0.027
Producer Price Index Ex Food, Energy, Trade (MoM) (AUG)	12-09-2018	12:30	USD	-	0.003
Producer Price Index Ex Food, Energy, Trade (YoY) (AUG)	12-09-2018	12:30	USD	-	0.028
Producer Price Index Final Demand (MoM) (AUG)	12-09-2018	12:30	USD	-	0
Producer Price Index Final Demand (YoY) (AUG)	12-09-2018	12:30	USD	-	0.033
Fed's Bullard Speaks to CFA Society Chicago	12-09-2018	13:30	USD	-	-
DOE Cushing OK Crude Inventory (SEP 7)	12-09-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 7)	12-09-2018	14:30	USD	-	-
DOE U.S. Distillate Inventories	12-09-2018	14:30	USD	-	-



DOE U.S. Gasoline Inventories (SEP 7)	12-09-2018	14:30	USD	-	-
U.S. to Sell 10-Year Notes	12-09-2018	17:00	USD	-	-
U.S. Federal Reserve Releases Beige Book (SEP 12)	12-09-2018	18:00	USD	-	-

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