



12 Oct.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,235	0.0 %	0.2 %
BSE SENSEX	34,001	(2.2) %	2.7 %
CNX BANK	24,784	0.0 %	1.9 %
CNX MIDCAP	16,277	0.0 %	(14.8) %
CNX SMALLCAP	5,863	0.0 %	(26.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,053	(2.1) %	0.9 %
S&P 500	2,728	(2.1) %	1.2 %
FTSE 100	7,007	(1.9) %	(8.4) %
HANG SENG	25,266	(3.5) %	(17.2) %
NIKKEI	22,591	(3.9) %	(3.9) %
SHANGHAI COMPOSITE	2,583	(5.2) %	(22.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	74.13	(0.4) %	16.4 %
EUR/USD	1.16	0.7 %	(3.5) %
GBP/USD	1.32	0.5 %	(2.1) %
USD/JPY	112.28	(0.7) %	(0.4) %
USD/AUD	1.41	0.1 %	9.9 %
USD/SGD	1.37	(0.4) %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	83	10.8 %	37.6 %
Gold(INR/10g)	31,310	0.9 %	6.6 %
Gold Comex(USD/oz)	1,196	0.2 %	(8.6) %
SILVER(INR/1Kg)	37,990	0.1 %	(1.6) %
Aluminium(USD/MT)	2,029	(0.1) %	(10.1) %
Copper(USD/MT)	6,294	1.2 %	(12.4) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	(0.1) %	0.7 %

**Global Economy:** A latest update from the IMF stated that the global economy is strong at the moment but it can clearly be seen that growth has plateaued. IMF expects global growth to remain at 3.7% for three years in a row (2017-19) though some of the risks that it highlighted in April, have now begun to materialize, especially from rising trade barriers. If these tensions were to escalate, the global economy would take a significant hit. With global public and private debt at an all-time high, any slight change in the wind could provoke capital outflows and economic instability in emerging markets. It said that global economy needs to press ahead with the financial regulatory agenda and resist backsliding. There has been a lot of progress over the past decade, but also an unfinished agenda—combined with the added challenges from continued financial innovation, which has its upside but also its downside.

**Global Equities:** Sentiments remained tense. European stocks fell near 20 month lows on Thursday on concerns about slowing global growth and worries over the rising US interest rates.

**Indian Economy:** The major ports in India have recorded a growth of 5.12% and together handled 343.26 Million Tonnes of cargo during the period April to September, 2018 as against 326.54 Million Tonnes handled during the corresponding period of previous year. For the period from April '17- September 2018, Nine Ports (Kolkata (incl.Haldia), Paradip, Visakhapatnam, Kamarajar, Chennai, Cochin, New Mangalore, JNPT and Deendayal have registered positive growth in traffic. The Central Government has approved a special package for employment generation in leather and footwear sector with an approved expenditure of Rs. 2600 Crore for 2017-20.

**Equity Markets:** Local stocks yet again took a tumble. Domestic stocks dropped amid a sell-off in global stocks. The barometer index, the S&P BSE Sensex, lost 759.74 points or 2.19% to 34,001.15. The Nifty 50 index fell 225.45 points or 2.16% to 10,234.65. The Sensex settled a tad above the psychological 34,000 level after sliding below that level in intraday trade. Metal and mining stocks declined. Shares of state-run oil and gas firms rose as global crude oil prices declined.

**Corporate News:** Top software exporter Tata Consultancy Services reported 22.57% YoY rise in profit at Rs 7,901 crore for the second quarter. Revenue for the quarter under review rose to Rs 36,854 crore compared with Rs 30,541 crore in the corresponding quarter last year, marking a rise of nearly 20%. Wipro announced the launch of its Innovation and Talent Hub in Reading, reinforcing the company's commitment to develop talent and strengthen STEM skills in the United Kingdom. NLC India has fixed 24 October 2018 as record date for buyback of shares. Mahindra & Mahindra (M&M) has launched an upgraded version of its Bolero Pik-up with price starting at Rs 6.7 lakh (ex-showroom Delhi).



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(111.1)	(281.1)	(45.1)
MF(INR cr)	1,063.9	1,215.2	440.6

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,030	41,735	35,347
F&O(INR cr)	1,994,265	1,180,369	968,813

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	23.0	15.3	14.1
NSE VIX	20.6	19.0	13.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,784	(2.1) %	1.9 %	Energy	13,797	0.1 %	3.8 %
IT	14,683	(3.0) %	15.5 %	Pharma	9,489	(2.9) %	10.1 %
Metals	3,307	(3.8) %	(6.6) %	Finance	10,267	(2.8) %	0.1 %
Auto	8,740	(2.5) %	(21.0) %	PSU	2,674	(5.2) %	(6.3) %
FMCG	27,375	(0.8) %	3.3 %	Real Estate	203	(2.8) %	(31.6) %

### 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>
HPCL	208	15.1 %	(39.6) %	Indiabulls	892	(8.8) %	(28.3) %
IOCL	131	5.6 %	(23.1) %	Bandhan Ba	470	(8.2) %	(1.2) %
United Spi	497	5.3 %	(24.0) %	Piramal En	2,232	(7.0) %	(9.7) %
BPCCL	278	4.8 %	(34.3) %	DLF	153	(6.3) %	(23.7) %
Colgate-Pa	1,100	4.4 %	4.0 %	Bajaj Fins	5,592	(6.2) %	6.2 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Performance Services Index (JUL)	12-10-2018	22:30	NZD	-	52.7
Food Prices (MoM) (JUL)	12-10-2018	22:45	NZD	-	0.005

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