



13 Jun.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,869	0.2 %	6.4 %
BSE SENSEX	35,693	0.6 %	7.7 %
CNX BANK	26,705	0.4 %	9.8 %
CNX MIDCAP	19,106	0.6 %	0.0 %
CNX SMALLCAP	7,782	0.7 %	(1.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,321	(0.0) %	2.0 %
S&P 500	2,787	0.2 %	3.4 %
FTSE 100	7,704	(0.4) %	0.7 %
HANG SENG	31,103	0.1 %	1.9 %
NIKKEI	22,878	0.3 %	(2.7) %
SHANGHAI COMPOSITE	3,080	0.9 %	(8.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.49	(0.0) %	6.0 %
EUR/USD	1.17	(0.2) %	(2.2) %
GBP/USD	1.34	(0.3) %	(1.1) %
USD/JPY	110.57	0.9 %	(1.9) %
USD/AUD	1.32	0.5 %	3.4 %
USD/SGD	1.34	0.0 %	0.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	0.4 %	9.9 %
Gold(INR/10g)	30,858	0.3 %	5.1 %
Gold Comex(USD/oz)	1,299	(0.2) %	(0.8) %
SILVER(INR/1Kg)	40,388	0.6 %	4.6 %
Aluminium(USD/MT)	2,309	0.4 %	2.3 %
Copper(USD/MT)	7,201	(0.3) %	0.3 %

**FIXED INCOME**

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

**Global Economy:** A report released by the Labor Department on Tuesday showed another modest increase in consumer prices in the US in the month of May. The Labor Department said its consumer price index rose by 0.2% in May, matching the increase seen in April. German ZEW Indicator of Economic Sentiment for Germany shed 7.9 points in June, to stand at minus 16.1 points, its lowest level in over five-and-a-half years, survey data from the Centre for European Economic Research or ZEW showed Tuesday. This is the lowest reading since September 2012 and well below the long-term average of 23.3 points, ZEW said. The current conditions index of the survey dropped 6.8 points to a score of 80.6 points. The UK unemployment rate remained unchanged at the lowest level since 1975, the Office for National Statistics reported. The ILO jobless rate remained at 4.2% in the three months ended April, but down from 4.6 percent a year ago. Australia's business confidence index fell to 6.0 in May from 11.0 in the previous month, survey data from the National Australia Bank showed Tuesday. Similarly, business conditions dropped by 6 points to 15 in May from April's record high of 21.0.

**Global Equities:** A mixed undertone prevailed in equities following the following the historical meeting between US president and North Korean leader Kim Jong Un in Singapore.

**Indian Economy:** The index of industrial production grew 4.9% in April, recording an improvement from 4.4% in March. The cumulative growth for the period April-March 2017-18 over the corresponding period of the previous year stands at 4.3%. Consumer price index (CPI) grew 4.87% in May, hitting a four-month high, from April's 4.58%, as prices of certain food items and fuel rose, data released by statistics office showed.

**Equity Markets:** Local stocks logged modest gains in steady session of trade on sustained buying demand in index pivotals. Domestic stocks edged higher in early trade. Key benchmark indices extended gains in morning trade. Stocks hovered in positive zone in mid-morning trade. Firmness prevailed on the bourses in early afternoon trade. Indices turned volatile and trimmed gains in afternoon trade. Indices hovered in positive zone in mid-afternoon trade. Stocks hit fresh intraday high in late trade.

**Corporate News:** Tata Consultancy Services has expanded its agreement with M&G Prudential, the UK and European savings and investments business of Prudential pic. The 10 year partnership, which was announced in January 2018, aimed to digitally transform M&G Prudential's business and deliver an enhanced service for its UK savings and retirement customers. Local investments and demand are set to grow strongly and capacity utilization is building up. These positive sentiments were universally expressed at a meeting of the National Council (NC) of the Confederation of Indian Industry (CII). The economy is in a sweet spot right now as the adjustment process regarding major reforms of the past few years is largely stabilised and industry is ready for a fresh phase of investment while capacity utilization builds up, noted Rakesh Bharti Mittal, President, CII. Rs 50,000 crore worth of investments have been recently announced, noted the CII release. A CEOs opinion poll held showed that 82% of the CEOs expect GDP growth to be higher than 7.00 % for the year 2018-19, with 10% of them expecting growth to be above 7.5%.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(177.4)	33.7	(43.5)
MF(INR cr)	(87.7)	185.5	487.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,609	27,961	33,563
F&O(INR cr)	613,695	757,922	804,425

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.4	15.5
NSE VIX	12.7	13.1	13.6

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,607	0.6 %	9.4 %	Energy	13,947	0.7 %	4.9 %
IT	13,860	0.6 %	9.1 %	Pharma	8,870	2.6 %	2.9 %
Metals	3,629	(0.4) %	2.5 %	Finance	11,075	0.6 %	7.9 %
Auto	11,243	0.0 %	1.7 %	PSU	3,100	2.3 %	8.6 %
FMCG	29,061	0.9 %	9.7 %	Real Estate	292	0.4 %	(1.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Lupin	855	5.6 %	10.0 %	Shree Ceme	16,255	(2.8) %	(0.9) %
Dr Reddy's	2,191	5.2 %	2.7 %	Marico	342	(2.1) %	4.2 %
Aurobindo	596	3.3 %	0.5 %	Bharti Air	381	(2.1) %	(3.7) %
St Bk of I	283	3.2 %	14.9 %	Hindalco I	241	(1.7) %	13.9 %
Cadila Hea	380	3.2 %	(1.3) %	Eicher Mot	29,208	(1.6) %	3.3 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (JUN)	13-06-2018	0:30	AUD	-	101.8
Westpac Consumer Confidence (JUN)	13-06-2018	0:30	AUD	-	(0.006)
RBA's Lowe gives speech in Melbourne	13-06-2018	2:00	AUD	-	-
Teranet/National Bank HP Index (MAY)	13-06-2018	12:30	CAD	-	219.49
Teranet/National Bank HPI (MoM) (MAY)	13-06-2018	12:30	CAD	-	0.002
Teranet/National Bank HPI (YoY) (MAY)	13-06-2018	12:30	CAD	-	0.056
Industrial Output w.d.a. (YoY) (1Q)	13-06-2018	7:15	CHF	-	0.087
Industry & Construction Output WDA (YoY) (1Q)	13-06-2018	7:15	CHF	-	0.085
Producer & Import Prices (MoM) (MAY)	13-06-2018	7:15	CHF	-	0.004
Producer & Import Prices (YoY) (MAY)	13-06-2018	7:15	CHF	-	0.027
Euro-Zone Employment (QoQ) (1Q)	13-06-2018	9:00	EUR	-	0.003
Euro-Zone Employment (YoY) (1Q)	13-06-2018	9:00	EUR	-	0.016
Euro-Zone Industrial Production s.a. (MoM) (APR)	13-06-2018	9:00	EUR	-	0.005
Euro-Zone Industrial Production w.d.a. (YoY) (APR)	13-06-2018	9:00	EUR	-	0.03
Bank of England's Anil Kashyap Speaks in London	13-06-2018	17:15	GBP	-	-
RICS House Price Balance (MAY)	13-06-2018	23:01	GBP	-	(0.08)
Consumer Price Index (MoM) (MAY)	13-06-2018	8:30	GBP	-	0.004
Consumer Price Index (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.024
Core Consumer Price Index (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.021
CPIH (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.022
House Price Index (YoY) (APR)	13-06-2018	8:30	GBP	-	0.042
Producer Price Index Input n.s.a. (MoM) (MAY)	13-06-2018	8:30	GBP	-	0.004
Producer Price Index Input n.s.a. (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.053
Producer Price Index Output Core n.s.a. (MoM) (MAY)	13-06-2018	8:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.024
Producer Price Index Output n.s.a. (MoM) (MAY)	13-06-2018	8:30	GBP	-	0.003
Producer Price Index Output n.s.a. (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.027
Retail Price Index (MAY)	13-06-2018	8:30	GBP	-	279.7
Retail Price Index (MoM) (MAY)	13-06-2018	8:30	GBP	-	0.005



Retail Price Index (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.034
Retail Price Index Ex Mort Int.Payments (YoY) (MAY)	13-06-2018	8:30	GBP	-	0.034
BOJ Outright Bond Purchase 5~10 Years	13-06-2018	1:10	JPY	-	-
MBA Mortgage Applications (JUN 08)	13-06-2018	11:00	USD	-	0.041
PPI Ex Food, Energy, Trade (MoM) (MAY)	13-06-2018	12:30	USD	-	0.001
PPI Ex Food, Energy, Trade (YoY) (MAY)	13-06-2018	12:30	USD	-	0.025
PPI Final Demand (YoY) (MAY)	13-06-2018	12:30	USD	-	0.026
Producer Price Index Ex Food and Energy (MoM) (MAY)	13-06-2018	12:30	USD	-	0.002
Producer Price Index Ex Food and Energy (YoY) (MAY)	13-06-2018	12:30	USD	-	0.023
Producer Price Index Final Demand (MoM) (MAY)	13-06-2018	12:30	USD	-	0.001
DOE Cushing OK Crude Inventory (JUN 08)	13-06-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 08)	13-06-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 08)	13-06-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 08)	13-06-2018	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (JUN 13)	13-06-2018	18:00	USD	-	0.015
FOMC Rate Decision (Upper Bound) (JUN 13)	13-06-2018	18:00	USD	-	0.0175
Fed's Powell Holds Press Conference Following FOMC Decision	13-06-2018	18:30	USD	-	-

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