



13 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,883	(0.2) %	1.8 %
BSE SENSEX	39,757	(0.5) %	2.1 %
CNX BANK	30,966	0.0 %	2.1 %
CNX MIDCAP	17,770	0.0 %	(3.1) %
CNX SMALLCAP	6,389	0.0 %	(5.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,005	(0.2) %	11.5 %
S&P 500	2,880	(0.2) %	14.9 %
FTSE 100	7,368	(0.4) %	9.4 %
HANG SENG	27,308	(1.7) %	8.7 %
NIKKEI	21,130	(0.4) %	8.0 %
SHANGHAI COMPOSITE	2,909	(0.6) %	18.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.34	0.2 %	(0.1) %
EUR/USD	1.13	(0.1) %	(1.1) %
GBP/USD	1.27	(0.2) %	(0.3) %
USD/JPY	108.59	0.3 %	(0.9) %
USD/AUD	1.44	0.6 %	1.2 %
USD/SGD	1.36	0.1 %	(0.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	0.0 %	14.5 %
Gold(INR/10g)	32,590	0.8 %	3.4 %
Gold Comex(USD/oz)	1,332	0.1 %	3.2 %
SILVER(INR/1Kg)	36,629	0.6 %	(4.3) %
Aluminium(USD/MT)	1,754	(0.1) %	(5.6) %
Copper(USD/MT)	5,829	(1.3) %	(0.2) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	(0.0) %	(0.5) %

Global Economy: The US consumer price index edged up by 0.1% in May after rising by 0.3% in April. Excluding food and energy prices, core consumer prices also edged up by 0.1% for the fourth consecutive month. However, on annual basis, headline index rose by 1.8% year-over-year in May compared to the 2% increase in April. The core consumer price growth also slowed to 2% annually in May from 2.1% in the previous month. China consumer prices were up 2.7% on year in May, the National Bureau of Statistics said on Wednesday, up from 2.5% in April – hitting 5 month high. The bureau also said that producer prices advanced an annual 0.6% down from 0.9% in the previous month. Europe is deeply integrated into global value chains, and recent trade tensions raise the question of how European economies would be affected by the introduction of tariffs or other trade barriers. About 70% of total European exports are linked to forward and backward supply chains. Therefore, shocks affecting existing trade flows between the major trade hubs – the United States, China, and Germany – could affect European economies through those supply chains, noted a latest research paper from the IMF. Japan's total value of core machine orders advanced a seasonally adjusted 5.2% on month in April, standing at 913.7 billion yen, the Cabinet Office said, following the 3.8% gain in March. On a yearly basis, core machine orders advanced 2.5%, following the 0.7% decline in the previous month. France's payroll employment increased in the first quarter driven by private sector, data from the statistical office Insee showed. Payroll job creation increased 0.4% to 93,800 in the first quarter after a 0.3% rise in the fourth quarter.

Global Equities: Equities eased around the globe as trade concerns and lingering worries about slowing global growth pulled back buying interest. Trade tensions intensified after US President Donald Trump said that he was holding up a trade deal with China.

Indian Economy: Consumer price inflation rate edged up to 3.05% in May, rising for the fourth month due to spike in food prices, the data released by the Central Statistics Office (CSO) said. The inflation based on Consumer Price Index (CPI) stood at 2.99% in the previous month. Industrial output grew 3.4% month-on-month in April, according to the Index of Industrial Production (IIP) data. The IIP for March has been revised to a growth 0.4%, up from a drop 0.1% earlier. The new government is aware of the challenges posed by the recent growth slowdown due to the global as well as domestic issues impacting the economy noted the FICCI President Sandip Somany. The Reserve Bank of India (RBI) has been net buyer of US dollars worth \$ 4.90 billion in the month of March 2019 on a net basis from the spot market. The RBI was also net buyers at \$9.41 billion in March 2019, while it was net seller at \$2.483 billion in April 2019. However, the RBI was net seller for entire FY2019 with net sales of \$15.377 billion. It had purchased \$ 40.804 billion and sold \$56.181 billion in FY2019.

Equity Markets: Local stocks ended with modest losses, snapping three-day gains, as negative global cues triggered profit booking. Stocks from auto banking and realty sectors declined. The barometer index, the S&P BSE Sensex, fell 193.65 points or 0.48% to 39,756.81. The Nifty 50 index fell 59.4 points or 0.50% to 11,906.2.

Corporate News: Power Finance Corporation (PFC) has raised \$1 billion (around 6,940 crore) through issuance of bonds in the international market. This was PFC's first issuance in the international market after acquiring the government's shareholding in REC, the company said in a BSE filing. Bureau of Energy Efficiency BEE has assigned Grade 1 ESCO grading rating to Tata Power in recognition of their ESCO (Energy Service Company) business performance.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	43.5	27.7	96.0
MF(INR cr)	144.4	(115.7)	(2.8)

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	1,784	29,664	34,518
F&O(INR cr)	1,129,363	1,297,895	1,191,396

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.9	16.5	15.2
NSE VIX	14.1	15.1	21.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,966	(1.0) %	2.1 %	Energy	16,202	(0.2) %	(2.0) %
IT	16,426	(0.1) %	3.7 %	Pharma	8,179	(0.8) %	(12.8) %
Metals	2,962	0.4 %	(4.5) %	Finance	13,363	(0.9) %	6.9 %
Auto	8,147	(1.1) %	(3.2) %	PSU	3,099	(0.4) %	(8.4) %
FMCG	30,379	0.2 %	0.6 %	Real Estate	275	(2.0) %	2.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Motherson	122	3.4 %	(20.4) %	Indiabulls	621	(7.9) %	(26.7) %
Tata Steel	506	2.7 %	(5.5) %	Biocon	258	(4.0) %	(16.7) %
United Spi	576	2.3 %	4.8 %	Shriram Tr	1,068	(3.7) %	(13.6) %
SAIL	50	1.5 %	(8.5) %	DLF	185	(3.7) %	(5.6) %
GAIL (Indi	310	1.3 %	(12.6) %	Bharti Inf	273	(3.5) %	(13.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (JUN)	13-06-2019	1:00	AUD	-	0.033
Employment Change (MAY)	13-06-2019	1:30	AUD	-	-
Full Time Employment Change (MAY)	13-06-2019	1:30	AUD	-	-
Part Time Employment Change (MAY)	13-06-2019	1:30	AUD	-	-
Participation Rate (MAY)	13-06-2019	1:30	AUD	-	0.658
Unemployment Rate (MAY)	13-06-2019	1:30	AUD	-	0.052
New Housing Price Index (MoM) (APR)	13-06-2019	12:30	CAD	-	0
New Housing Price Index (YoY) (APR)	13-06-2019	12:30	CAD	-	0.001
SECO June 2019 Economic Forecasts	13-06-2019	5:45	CHF	-	-
Producer & Import Prices (MoM) (MAY)	13-06-2019	6:30	CHF	-	0
Producer & Import Prices (YoY) (MAY)	13-06-2019	6:30	CHF	-	(0.006)
KOF Institute Summer Economic Forecast	13-06-2019	7:00	CHF	-	-
SNB 3-Month Libor Lower Target Range (JUN 13)	13-06-2019	7:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (JUN 13)	13-06-2019	7:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (JUN 13)	13-06-2019	7:30	CHF	-	(0.0075)
German Consumer Price Index (MoM) (MAY F)	13-06-2019	6:00	EUR	-	0.002
German Consumer Price Index (YoY) (MAY F)	13-06-2019	6:00	EUR	-	0.014
Euro-Zone Industrial Production s.a. (MoM) (APR)	13-06-2019	9:00	EUR	-	(0.003)
Euro-Zone Industrial Production w.d.a. (YoY) (APR)	13-06-2019	9:00	EUR	-	(0.006)
Tertiary Industry Index (MoM) (APR)	13-06-2019	4:30	JPY	-	(0.004)
BusinessNZ Manufacturing PMI (MAY)	13-06-2019	22:30	NZD	-	53
Food Prices (MoM) (MAY)	13-06-2019	22:45	NZD	-	(0.001)
Continuing Claims (JUN 1)	13-06-2019	12:30	USD	-	-
Export Price Index (MoM) (MAY)	13-06-2019	12:30	USD	-	0.002
Export Price Index (YoY) (MAY)	13-06-2019	12:30	USD	-	0.003
Import Price Index (MoM) (MAY)	13-06-2019	12:30	USD	-	0.002
Import Price Index (YoY) (MAY)	13-06-2019	12:30	USD	-	(0.002)
Import Price Index ex Petroleum (MoM) (MAY)	13-06-2019	12:30	USD	-	(0.006)
Initial Unemployment Claims (JUN 6)	13-06-2019	12:30	USD	-	-



EIA Natural Gas Storage Change (JUN 7)	13-06-2019	14:30	USD	-	119
U.S. to Sell 4-Week Bills	13-06-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	13-06-2019	15:30	USD	-	-
U.S. to Sell USD16 Bln 30-Year Bonds Reopening	13-06-2019	17:00	USD	-	-

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