



13 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,057	0.3 %	8.3 %
BSE SENSEX	36,548	0.8 %	10.2 %
CNX BANK	27,047	0.1 %	11.2 %
CNX MIDCAP	18,526	0.3 %	(3.0) %
CNX SMALLCAP	7,384	(0.2) %	(6.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,925	0.9 %	0.4 %
S&P 500	2,798	0.9 %	3.8 %
FTSE 100	7,651	0.8 %	0.0 %
HANG SENG	28,481	0.6 %	(6.7) %
NIKKEI	22,188	1.2 %	(5.6) %
SHANGHAI COMPOSITE	2,838	2.2 %	(15.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.57	(0.4) %	7.7 %
EUR/USD	1.17	(0.6) %	(2.9) %
GBP/USD	1.32	(0.6) %	(2.4) %
USD/JPY	112.65	1.6 %	(0.1) %
USD/AUD	1.35	0.1 %	5.5 %
USD/SGD	1.36	0.2 %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	(5.0) %	16.6 %
Gold(INR/10g)	30,147	(0.8) %	2.7 %
Gold Comex(USD/oz)	1,244	(0.6) %	(5.0) %
SILVER(INR/1Kg)	38,777	(0.7) %	0.4 %
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: The US Labor Department said its consumer price index inched up by 0.1% in June after rising by 0.2% in May. Excluding food and energy prices, core consumer prices increased by 0.2% for the second consecutive month. The European Commission trimmed its growth forecast for euro area to 2.1% this year and 2% next year as economic momentum moderated in the first half of 2018 after five straight quarters of vigorous expansion. The projection for this year was downgraded from 2.3%. According to the latest Summer Interim Economic Forecast, growth momentum is expected to strengthen somewhat in the second half of 2018, as labor market conditions improve, household debt declines, consumer confidence remains high and monetary policy remains supportive.

Global Equities: Heavy gains emerged in major indices with emerging market assets being favored by investors following a tumble in crude oil. Shares in China jumped more than 2% on the day.

Indian Economy: The consumer price inflation rose to five-month high of 5% in June while industrial production slipped to 3.2% in May, according to Government data released on Thursday. According to a latest update from India Ratings and Research, India's crude oil dependency has increased, indicated by stagnant domestic production and increased imports since 2012. According to Petroleum Planning & Analysis Cell (PPAC), the average crude oil import dependency was 82.8% of the total crude oil consumption in FY18 compared with 81.7% in FY17. PPAC estimates crude imports of 227 million metric tons (mmt) for FY19 (FY18: 220mmt). Domestic Crude imports increased 22.5% from a monthly average of 15.1mmt during 1QFY13 to a monthly average of 18.5mmt during the three months ended May 2018 due to sustained demand. On the other hand, domestic crude production has been stagnant over last few years. Crude imports continue to increase despite rising international crude prices since February 2016, thus indicating strong demand for the commodity.

Equity Markets: Local stocks have ended the last session on a strong note, with the Sensex adding around 280 points, while the Nifty closed above the critical 11,000-mark. Key barometers registered strong gains in a steady session of trade led by index heavyweights Reliance Industries, HDFC and HDFC Bank. An overnight slump in crude oil prices and positive global stocks boosted sentiment on the domestic bourses. The Sensex settled at a record closing high while the Nifty closed near its all time high.

Corporate News: Bharti Airtel announced that its subsidiary, Airtel Payments Bank has received requisite approvals from The Reserve Bank of India to start on boarding new customers. Airtel Payments Bank has also been permitted by the UIDAI to resume the on-boarding of customers using Aadhaar based e-KYC. Dilip Buildcon has incorporated a new special purpose vehicle for Bellary to Byrapura Section of NH-150A on Hybrid Annuity Project under Bharatmala Pariyojana valued at Rs 1313.90 crore by the National Highways Authority of India in the State of Karnataka. Karnataka Bank reported a 22% year-on-year rise in June quarter profit at Rs 163.24 crore compared with Rs 133.85 crore reported for the same quarter last financial year. NIIT is targeting to train one lakh students in the next three years from IT and BFSI sectors, according to media reports.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(171.0)	(19.7)	(41.8)
MF(INR cr)	37.8	196.4	477.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,293	29,733	32,631
F&O(INR cr)	1,706,179	836,015	836,946

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.6	14.4	15.2
NSE VIX	12.5	12.7	13.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,027	0.8 %	11.1 %	Energy	14,166	2.7 %	6.6 %
IT	14,516	(0.1) %	14.2 %	Pharma	9,244	0.2 %	7.2 %
Metals	3,300	(0.5) %	(6.8) %	Finance	11,263	1.0 %	9.8 %
Auto	11,038	(0.8) %	(0.2) %	PSU	2,823	1.1 %	(1.1) %
FMCG	29,933	0.4 %	12.9 %	Real Estate	271	(1.1) %	(8.4) %

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>
Interglobe	1,124	4.7 %	(15.4) %	UPL	582	(3.6) %	(22.7) %
Reliance I	1,082	4.2 %	21.2 %	S A I L	75	(3.6) %	2.2 %
B P C L	377	3.0 %	(10.9) %	Vedanta	211	(3.1) %	(25.1) %
Bank of Ba	119	2.8 %	(15.8) %	General In	371	(2.9) %	0.3 %
Wipro	279	2.7 %	(3.5) %	United Spi	603	(2.7) %	(7.7) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
Existing Home Sales (MoM) (JUN)	13-07-2018	13:00	CAD	-	(0.001)
Producer & Import Prices (MoM) (JUN)	13-07-2018	7:15	CHF	-	0.002
Producer & Import Prices (YoY) (JUN)	13-07-2018	7:15	CHF	-	0.032
German Wholesale Price Index (MoM) (JUN)	13-07-2018	6:00	EUR	-	0.008
German Wholesale Price Index (YoY) (JUN)	13-07-2018	6:00	EUR	-	0.029
Bank of England Deputy Governor Jon Cunliffe Speaks in Kendall	13-07-2018	11:00	GBP	-	-
BOJ Outright Bond Purchase 10~25 Years	13-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	13-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	13-07-2018	1:10	JPY	-	-
Capacity Utilization (MoM) (MAY)	13-07-2018	4:30	JPY	-	0.018
Industrial Production (MoM) (MAY F)	13-07-2018	4:30	JPY	-	(0.002)
Industrial Production (YoY) (MAY F)	13-07-2018	4:30	JPY	-	0.042
Export Price Index (MoM) (JUN)	13-07-2018	12:30	USD	-	0.006
Export Price Index (YoY) (JUN)	13-07-2018	12:30	USD	-	0.049
Import Price Index (MoM) (JUN)	13-07-2018	12:30	USD	-	0.006
Import Price Index (YoY) (JUN)	13-07-2018	12:30	USD	-	0.043
Import Price Index ex Petroleum (MoM) (JUN)	13-07-2018	12:30	USD	-	0.001
U. of Mich. 1 Yr Inflation (JUL P)	13-07-2018	14:00	USD	-	0.03
U. of Mich. 5-10 Yr Inflation (JUL P)	13-07-2018	14:00	USD	-	0.026
U. of Mich. Current Conditions (JUL P)	13-07-2018	14:00	USD	-	116.5
U. of Mich. Expectations (JUL P)	13-07-2018	14:00	USD	-	86.3
U. of Mich. Sentiment (JUL P)	13-07-2018	14:00	USD	-	98.2
Fed Releases Monetary Policy Report to Congress	13-07-2018	15:00	USD	-	-
Fed's Bostic Holds Town Hall Chat in Northern Virginia	13-07-2018	16:30	USD	-	-
Baker Hughes U.S. Rig Count (JUL 13)	13-07-2018	17:00	USD	-	1052

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