



13 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,110	0.7 %	(4.8) %
BSE SENSEX	37,582	0.7 %	(3.3) %
CNX BANK	28,432	1.1 %	(6.2) %
CNX MIDCAP	15,947	1.0 %	(13.0) %
CNX SMALLCAP	5,501	1.0 %	(18.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,898	(1.5) %	11.0 %
S&P 500	2,883	(1.2) %	15.0 %
FTSE 100	7,227	(0.4) %	7.3 %
HANG SENG	25,825	(0.4) %	2.8 %
NIKKEI	20,685	0.4 %	5.7 %
SHANGHAI COMPOSITE	2,815	1.5 %	14.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.59	(0.5) %	1.7 %
EUR/USD	1.12	(0.1) %	(2.2) %
GBP/USD	1.21	(0.0) %	(4.7) %
USD/JPY	106.07	(0.0) %	(3.2) %
USD/AUD	1.47	(0.7) %	3.7 %
USD/SGD	1.38	(0.1) %	1.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	0.9 %	17.7 %
Gold(INR/10g)	37,270	0.6 %	18.2 %
Gold Comex(USD/oz)	1,512	1.0 %	17.2 %
SILVER(INR/1Kg)	43,009	0.3 %	12.4 %
Aluminium(USD/MT)	1,743	(0.2) %	(6.2) %
Copper(USD/MT)	5,724	(0.3) %	(2.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.1) %	(1.0) %

Global Economy: The economic outlook has deteriorated worldwide as the trade dispute between the United States and China escalates, a survey showed on Monday. Germany's Ifo economic institute said its quarterly survey among nearly 1,200 experts in more than 110 countries showed that its measures for current conditions and economic expectations have both worsened in the third quarter. The Ifo World Economic Climate indicator fell from -2.4 to -10.1 points in the third quarter. Both the assessment of the current situation and expectations dropped significantly. The intensification of the trade conflict is having a considerable detrimental effect on the world economy. The experts expect significantly weaker growth in world trade. Trade expectations are at their lowest level since the outbreak of the trade conflict last year. Respondents also expect weaker private consumption, lower investment activity, and declining short- and long-term interest rates.

Global Equities: DOW fell 1.5% as the US President Donald Trump said he was not ready to make a trade deal with China.

Indian Economy: Finance minister Nirmala Sitharaman said it is the government's intent to reduce the corporate tax rate and assured the industry of looking at a review of the penal provisions brought in for corporate social responsibility norms. India's fuel product consumption or sales improved 3.3% to 17.58 million tonnes (mt) in July 2019 over a year ago. Consumption or sales of fuel products rose 1.6% to 72.52 mt in April-July 2019 over April-July 2018. Sales of petrol increased 9.7% to 10.35 mt, diesel 2.4% to 29.37 mt, others 18.4% to 4.07 mt, and LPG 1.1% to 7.96 mt.

Equity Markets: Domestic barometers advanced for a second consecutive trading session on Friday, amid media reports that the government may exempt the tax surcharge on foreign portfolio investors (FPIs). HDFC twins and ICICI Bank were the biggest contributors to the rise. Auto shares were in demand. The Sensex rose 254.55 points or 0.68% to settle at 37,581.91 while Nifty 50 index rose 77.20 points or 0.70% to settle at 11,109.65. Domestic stock markets were shut on Monday, 12 August 2019 on account of Bakri Id.

Corporate News: Reliance Industries Ltd will sell a 20% stake in its oil-to-chemicals business to Saudi Aramco at an enterprise value of \$75 billion, making it one of the biggest FDI deals in the country. The company is also planning to become a net zero debt company in 18 months. Reliance Jio Fiber services will start on 5 September. Kalpataru Power Transmission Ltd on August 12 said its board has approved allotment of 12.54 lakh equity shares worth Rs 64.65 crore to Tano India Private Equity Fund II under a deal to acquire full stake in warehousing firm Shree Shubham Logistics. Tata Communications and that IBM have joined the Hedera Governing Council. The Council, which will comprise up to 39 multinational entities from a diverse array of industries, was designed to ensure decentralized and responsible governance for a next-generation Distributed Ledger Technology (DLT) platform. Praj Industries has announced that it has entered into a Cooperation Agreement with Dedini S/A Industrias de Base to provide ethanol production technologies to the Brazilian market. Motherson Sumi said its overall revenue grew by 14% and crossed Rs. 16,000 crores for the third consecutive quarter in Q1 FY20. The company said that it continue to focus on managing cash flows and debt, and in improving operational efficiency.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(150.4)	(230.0)	13.3
MF(INR cr)	93,566.0	93,566.0	1,374.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,568	37,256	34,312
F&O(INR cr)	868,188	1,577,247	1,261,176

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	18.0	19.2	15.0
NSE VIX	15.9	15.9	17.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,432	1.1 %	(6.2) %	Energy	14,155	0.2 %	(14.4) %
IT	15,821	(0.3) %	(0.1) %	Pharma	7,924	(0.5) %	(15.5) %
Metals	2,398	(0.9) %	(22.7) %	Finance	12,775	1.5 %	2.2 %
Auto	7,137	2.0 %	(15.2) %	PSU	2,596	(0.2) %	(23.3) %
FMCG	29,302	0.6 %	(3.0) %	Real Estate	266	0.8 %	(0.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	505	13.7 %	(40.4) %	Yes Bank	82	(7.9) %	(70.2) %
Motherson	107	9.2 %	(30.1) %	Vodafone I	5	(5.3) %	(69.9) %
Eicher Mot	17,587	4.6 %	(12.3) %	Page Indus	17,682	(4.3) %	(30.7) %
L&T Fin.Ho	104	4.5 %	(31.7) %	ICICI Lomb	1,154	(3.9) %	13.7 %
MRF	57,034	4.3 %	(5.2) %	Cipla	485	(3.7) %	(7.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
NAB Business Conditions (JUL)	13-08-2019	1:30	AUD	-	3
NAB Business Confidence (JUL)	13-08-2019	1:30	AUD	-	2
German Consumer Price Index (MoM) (JUL F)	13-08-2019	6:00	EUR	-	0.005
German Consumer Price Index (YoY) (JUL F)	13-08-2019	6:00	EUR	-	0.017
German Wholesale Price Index (MoM) (JUL)	13-08-2019	6:00	EUR	-	(0.005)
German Wholesale Price Index (YoY) (JUL)	13-08-2019	6:00	EUR	-	0.003
Euro-Zone ZEW Survey (Economic Sentiment) (AUG)	13-08-2019	9:00	EUR	-	(20.3)
German ZEW Survey Current Situation (AUG)	13-08-2019	9:00	EUR	-	(1.1)
German ZEW Survey Expectations (AUG)	13-08-2019	9:00	EUR	-	(24.5)
Average Weekly Earnings (3M/YoY) (JUN)	13-08-2019	8:30	GBP	-	0.034
Claimant Count Rate (JUL)	13-08-2019	8:30	GBP	-	0.032
Employment Change 3M/3M (JUN)	13-08-2019	8:30	GBP	-	-
ILO Unemployment Rate 3Mths (JUN)	13-08-2019	8:30	GBP	-	0.038
Jobless Claims Change (JUL)	13-08-2019	8:30	GBP	-	-
Weekly Earnings ex Bonus (3M/YoY) (JUN)	13-08-2019	8:30	GBP	-	0.036
Machine Orders (MoM) (JUN)	13-08-2019	23:50	JPY	-	(0.078)
Machine Orders (YoY) (JUN)	13-08-2019	23:50	JPY	-	(0.037)
Tertiary Industry Index (MoM) (JUN)	13-08-2019	4:30	JPY	-	(0.002)
Machine Tool Orders (YoY) (JUL P)	13-08-2019	6:00	JPY	-	(0.379)
NFIB Small Business Optimism (JUL)	13-08-2019	10:00	USD	-	103.3
Consumer Price Index (MoM) (JUL)	13-08-2019	12:30	USD	-	0.001
Consumer Price Index (YoY) (JUL)	13-08-2019	12:30	USD	-	0.016
Consumer Price Index Core Index s.a. (JUL)	13-08-2019	12:30	USD	-	262.803
Consumer Price Index Ex Food and Energy (MoM) (JUL)	13-08-2019	12:30	USD	-	0.003
Consumer Price Index Ex Food and Energy (YoY) (JUL)	13-08-2019	12:30	USD	-	0.021
Consumer Price Index n.s.a. (JUL)	13-08-2019	12:30	USD	-	256.143
Real Avg Hourly Earning (YoY) (JUL)	13-08-2019	12:30	USD	-	0.015
Real Avg Weekly Earnings (YoY) (JUL)	13-08-2019	12:30	USD	-	0.012
New York Fed to release Q2 Household Debt and Credit Report	13-08-2019	15:00	USD	-	-



U.S. to Sell USD28 Bln 52-Week Bills

13-08-2019 15:30

USD

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