



14 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,867	(0.4) %	1.7 %
BSE SENSEX	39,741	(0.0) %	1.9 %
CNX BANK	30,813	(0.5) %	1.6 %
CNX MIDCAP	17,649	(0.4) %	(3.7) %
CNX SMALLCAP	6,321	(0.4) %	(6.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,107	0.4 %	11.9 %
S&P 500	2,892	0.4 %	15.3 %
FTSE 100	7,369	0.0 %	9.4 %
HANG SENG	27,295	(0.1) %	8.6 %
NIKKEI	21,032	(0.5) %	7.5 %
SHANGHAI COMPOSITE	2,911	0.1 %	18.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.37	(0.1) %	(0.1) %
EUR/USD	1.13	(0.2) %	(1.4) %
GBP/USD	1.27	(0.1) %	(0.5) %
USD/JPY	108.39	(0.1) %	(1.1) %
USD/AUD	1.45	0.8 %	1.8 %
USD/SGD	1.37	0.0 %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	52	(1.9) %	12.3 %
Gold(INR/10g)	32,632	0.1 %	3.5 %
Gold Comex(USD/oz)	1,304	(2.1) %	1.0 %
SILVER(INR/1Kg)	36,720	0.2 %	(4.0) %
Aluminium(USD/MT)	1,756	0.1 %	(5.5) %
Copper(USD/MT)	5,798	(0.5) %	(0.7) %

FIXED INCOME

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

Global Economy: The US Labor Department said import prices fell by 0.3% in May following a revised 0.1% gain in April. The export prices also edged down by 0.2% in May after inching up by a revised 0.1% in April. The US initial claims were 222,000, an increase of 3,000 from the previous week's revised level. The previous week's level was revised up by 1,000 from 218,000 to 219,000. The 4-week moving average was 217,750, an increase of 2,500 from the previous week's revised average. The previous week's average was revised up by 250 from 215,000 to 215,250. Eurozone industrial production declined 0.5% month-on-month in April, following a 0.4% fall in March, figures from Eurostat showed on Thursday. The latest decrease in production was the worst since December last year, when it was down 0.9%. The latest decline was driven by 1.7% fall in durable consumer goods. Capital goods and intermediate goods also fell 1.4% and 1%, respectively. On a year-on-year basis, industrial production fell 0.4% in April, following a 0.7% decline in the previous month. Germany's consumer price inflation eased to 1.4% in May from 2 percent in April, from a five-month high on air tickets and holiday packages, final data from Destatis revealed. On a monthly basis, consumer prices gained 0.2% in May, in line with flash estimate. Australia jobless rate came in at a seasonally adjusted 5.2 percent in May, the Australian Bureau of Statistics said on Thursday, unchanged from the April reading. The Australian economy added 42,300 jobs last month to 12,868,200 following the increase of 28,400 in the previous month. Full-time employment increased 2,400 to 8,792,900 persons and part-time employment increased 39,800 to 4,075,400 persons. Unemployment decreased 2,400 to 704,700 persons.

Global Equities: Geopolitical worries returned to the foray following the spate of oil tanker attacks in the Gulf of Oman.

Indian Economy: The water storage available in 91 major reservoirs of the country for the week ending on June 13, 2019 was 29.189 BCM, which is 18% of total storage capacity of these reservoirs. This percentage was at 19 for the week ending on June 06, 2019. The level of water storage in the week ending on June 13, 2019 was 104% of the storage of corresponding period of last year and 101% of storage of average of last ten years. Advertising spend in India is likely to spurt by 11.4% to Rs 697 billion in 2019, driven by key events such as the ongoing cricket world cup and the recent general elections, according to a report by the Dentsu Aegis Network (DAN).

Equity Markets: A divergent trend was witnessed as the barometer index, the S&P BSE Sensex, settled with small losses while the Nifty 50 index registered small gains. Intraday volatility was high. The market breadth was weak. The Nifty settled above 11,900 level. The barometer index, the S&P BSE Sensex, fell 15.45 points or 0.04% to 39,741.36. The Nifty 50 index, rose 7.85 points or 0.07% to 11,914.05.

Corporate News: Wipro announced that it will be opening a new center of excellence for clients in the Minneapolis-St. Paul region in USA. Wipro and client teams will collaborate on digital solutions, with a focus on financial technology, and will add 100 local jobs over the next two years to its already substantial presence in the Twin Cities. CEAT has entered into share subscription and shareholders' agreement with E-Fleet Systems (E-Fleet) for making investment of not exceeding Rs 4 crore in E-Fleet. The Confederation of All India Traders (CAIT) urged the government to lower GST rates on various products, including auto parts and aluminium utensils. The traders body also suggested to review items placed under different tax slabs under Goods and Services Tax (GST) as many of the products are overlapping.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(92.7)	10.5	92.1
MF(INR cr)	444.1	(34.3)	6.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,631	30,160	34,500
F&O(INR cr)	2,476,549	1,445,227	1,217,624

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.8	16.4	15.2
NSE VIX	13.7	14.9	21.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,976	0.0 %	2.1 %	Energy	16,209	0.0 %	(2.0) %
IT	16,317	(0.7) %	3.0 %	Pharma	8,149	(0.4) %	(13.1) %
Metals	2,956	(0.2) %	(4.7) %	Finance	13,482	0.9 %	7.9 %
Auto	8,117	(0.4) %	(3.5) %	PSU	3,067	(1.0) %	(9.4) %
FMCG	30,355	(0.1) %	0.5 %	Real Estate	277	0.6 %	3.5 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	694	11.8 %	(18.0) %	Yes Bank	117	(13.1) %	(57.6) %
Zee Entert	353	2.8 %	(18.3) %	IndusInd B	1,489	(5.2) %	(14.6) %
HDFC Life	452	2.5 %	17.8 %	New India	154	(3.4) %	(18.4) %
H P C L	310	2.5 %	9.1 %	ICICI Pru	361	(2.6) %	(0.4) %
ICICI Lomb	1,153	2.2 %	13.6 %	Piramal En	2,077	(2.5) %	(22.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Fixed Assets Ex Rural YTD (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.061
Industrial Production (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.054
Industrial Production YTD (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.062
Property Investment YTD (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.119
Retail Sales (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.072
Retail Sales YTD (YoY) (MAY)	14-06-2019	2:00	CNY	-	0.08
Surveyed Jobless Rate (MAY)	14-06-2019	2:00	CNY	-	0.05
German Wholesale Price Index (MoM) (MAY)	14-06-2019	6:00	EUR	-	0.006
German Wholesale Price Index (YoY) (MAY)	14-06-2019	6:00	EUR	-	0.021
BOE Governor Mark Carney speaks in London.	14-06-2019	12:55	GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	14-06-2019	1:10	JPY	-	-
Capacity Utilization (MoM) (APR)	14-06-2019	4:30	JPY	-	(0.004)
Industrial Production (MoM) (APR F)	14-06-2019	4:30	JPY	-	0.006
Industrial Production (YoY) (APR F)	14-06-2019	4:30	JPY	-	(0.011)
Retail Sales Advance (MoM) (MAY)	14-06-2019	12:30	USD	-	(0.002)
Retail Sales Control Group (MAY)	14-06-2019	12:30	USD	-	0
Retail Sales Ex Auto (MoM) (MAY)	14-06-2019	12:30	USD	-	0.001
Retail Sales Ex Auto and Gas (MAY)	14-06-2019	12:30	USD	-	(0.002)
Capacity Utilization (MAY)	14-06-2019	13:15	USD	-	0.779
Industrial Production (MoM) (MAY)	14-06-2019	13:15	USD	-	(0.005)
Manufacturing (SIC) Production (MAY)	14-06-2019	13:15	USD	-	(0.005)
Business Inventories (APR)	14-06-2019	14:00	USD	-	0
U. of Mich. 1 Yr Inflation (JUN P)	14-06-2019	14:00	USD	-	0.029
U. of Mich. 5-10 Yr Inflation (JUN P)	14-06-2019	14:00	USD	-	0.026
U. of Mich. Current Conditions (JUN P)	14-06-2019	14:00	USD	-	110
U. of Mich. Expectations (JUN P)	14-06-2019	14:00	USD	-	93.5
U. of Mich. Sentiment (JUN P)	14-06-2019	14:00	USD	-	100
Baker Hughes U.S. Rig Count (JUN 14)	14-06-2019	17:00	USD	-	975



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