



14 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,926	(1.7) %	(6.4) %
BSE SENSEX	36,958	(1.7) %	(4.9) %
CNX BANK	27,729	(2.5) %	(8.6) %
CNX MIDCAP	15,602	(2.2) %	(14.9) %
CNX SMALLCAP	5,413	(1.6) %	(19.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,280	1.4 %	12.7 %
S&P 500	2,926	1.5 %	16.7 %
FTSE 100	7,251	0.3 %	7.7 %
HANG SENG	25,281	(2.1) %	0.6 %
NIKKEI	20,455	(1.1) %	4.6 %
SHANGHAI COMPOSITE	2,797	(0.6) %	13.5 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.11	0.2 %	2.4 %
EUR/USD	1.12	(0.0) %	(2.1) %
GBP/USD	1.21	(0.7) %	(5.3) %
USD/JPY	105.33	(0.7) %	(3.9) %
USD/AUD	1.48	(0.3) %	4.1 %
USD/SGD	1.39	0.3 %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	3.1 %	21.3 %
Gold(INR/10g)	37,799	1.4 %	19.9 %
Gold Comex(USD/oz)	1,503	(0.6) %	16.4 %
SILVER(INR/1Kg)	44,111	2.6 %	15.3 %
Aluminium(USD/MT)	1,731	(0.7) %	(6.8) %
Copper(USD/MT)	5,967	4.2 %	2.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	0.0 %	(0.9) %

Global Economy: The US Labor Department said its consumer price index climbed by 0.3% in July after inching up by 0.1% in both May and June. Germany's investor confidence dropped sharply in August to its lowest level since the end of 2011, survey data from the ZEW showed Tuesday. The ZEW Indicator of Economic Sentiment for Germany tumbled to -44.1 from -24.5 in July. Germany's wholesale prices eased 0.1% year-on-year in July, following a 0.3% rise in June, data from Destatis showed. The latest fall was the first since September 2016. Germany's consumer price inflation climbed 1.7% year-on-year in July following a 1.6% increase in June. UK unemployment rate increased in three months to June and average earnings grew at the fastest pace in eleven years, data from the Office for National Statistics showed. The jobless rate increased by 0.1 percentage points on quarter to 3.9% in three months to June. Unemployment rose by 31,000 to 1.33 million. In three months to June, UK employment increased by 115,000 to reach a record 32.81 million. Japanese machine tool orders continued to fall at a sharp rate in July. Machine tool orders fell 33% year-on-year in July after a 37.9% tumble in June. Japan's tertiary industry activity fell for the first time in three months in June, data from the Ministry of Economy, Trade and Industry showed. The tertiary industry activity index edged down 0.1% month-on-month in June. Weakness in the Australian dollar following the interest rate reduction is underpinning economic growth, Reserve Bank of Australia Assistant Governor Christopher Kent said Tuesday. Singapore economy is set to see weaker growth this year as deepening trade disputes and slow global growth weigh on the city-state. Singapore economy is forecast to expand in the range of 0.0 to 1.0% this year instead of 1.5 to 2.5% estimated previously, the Ministry of Trade and Industry said.

Global Equities: The Dow spiked 1.4% after US Trade Representative Robert Lighthizer offered a temporary reprieve from concerns about trade war by announcing a delay in imposing new tariffs on certain Chinese products. Lighthizer said the 10% tariff set to take effect on September 1st should be delayed until December 15th for certain products.

Indian Economy: Real estate sector outlook slipped to pessimistic, according to Knight Frank - FICCI - NAREDCO Real Estate Sentiment Index. Weak demand, inventory overhang, developer defaults and NBFC crisis impacting real estate sector says the index. FICCI-IBA survey said that around 55% of reporting Public sector banks cited reduction in NPA levels in H1 2019. Domestic commercial vehicle sales dipped 26% while passenger cars sales plunged 36% in July 2019 said SIAM. SIAM also stated that the auto industry downturn has further deepened de-growth of all segments continues.

Equity Markets: Local stocks slumped on Tuesday, dragged by weakness in auto and IT stocks. Selling in HDFC twins also put pressure on bourses. Sensex slipped below the 37,000 level while the Nifty breached the 11,000 mark. S&P BSE Sensex, fell 675.18 points or 1.80% to 36,906.73, as per the provisional closing data. Nifty 50 index fell 183.80 points or 1.65% to 10,925.85, as per the provisional closing data.

Corporate News: IT stocks could be in focus as the Indian Rupee was hammered to near six month low amid steep correction in local markets yesterday. INR closed at 71.48, down 62 paise against US dollar. Sun Pharmaceutical Industries' June quarter profit increased to Rs 1,387.5 crore in Q1, from Rs 1,057.3 crore in same period last year, up 31%. Revenue from operations during the quarter jumped nearly 16% to Rs 8,374.4 crore. ONGC recorded 24.40 YoY fall in consolidated net profit at Rs 7,042.69 crore for the June quarter. Consolidated revenue from operations slipped by 0.91% to Rs 1.09 lakh crore in the June quarter.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(105.8)	(212.3)	11.9
MF(INR cr)	93,566.0	93,566.0	1,374.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,622	37,551	34,370
F&O(INR cr)	1,364,010	1,550,592	1,262,306

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.1	19.5	15.1
NSE VIX	17.8	16.1	17.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,729	(2.5) %	(8.6) %	Energy	14,424	1.9 %	(12.8) %
IT	15,424	(2.5) %	(2.6) %	Pharma	7,852	(0.9) %	(16.2) %
Metals	2,356	(1.8) %	(24.1) %	Finance	12,394	(3.0) %	(0.8) %
Auto	6,856	(3.9) %	(18.5) %	PSU	2,527	(2.7) %	(25.3) %
FMCG	28,729	(2.0) %	(4.9) %	Real Estate	263	(1.0) %	(1.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	573	13.4 %	(32.4) %	B H E L	51	(11.2) %	(33.4) %
Reliance I	1,275	9.7 %	(8.4) %	Yes Bank	74	(10.4) %	(73.3) %
Sun Pharma	439	4.1 %	(8.3) %	Motherson	97	(9.4) %	(36.7) %
NHPC Ltd	23	2.0 %	(10.2) %	Divi's Lab	1,524	(8.4) %	(11.5) %
Page Indus	17,990	1.7 %	(29.5) %	Vodafone I	5	(6.5) %	(71.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (AUG)	14-08-2019	0:30	AUD	-	96.5
Westpac Consumer Confidence (AUG)	14-08-2019	0:30	AUD	-	(0.041)
Wage Price Index (QoQ) (2Q)	14-08-2019	1:30	AUD	-	0.005
Wage Price Index (YoY) (2Q)	14-08-2019	1:30	AUD	-	0.023
RBA's Debelle Gives Speech in Sydney	14-08-2019	23:00	AUD	-	-
RBA's Debelle Speaks on Sydney Panel	14-08-2019	7:30	AUD	-	-
Fixed Assets Ex Rural YTD (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.058
Industrial Production (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.063
Industrial Production YTD (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.06
Property Investment YTD (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.109
Retail Sales (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.098
Retail Sales YTD (YoY) (JUL)	14-08-2019	2:00	CNY	-	0.084
Surveyed Jobless Rate (JUL)	14-08-2019	2:00	CNY	-	0.051
German Gross Domestic Product n.s.a. (YoY) (2Q P)	14-08-2019	6:00	EUR	-	0.006
German Gross Domestic Product s.a. (QoQ) (2Q P)	14-08-2019	6:00	EUR	-	0.004
German Gross Domestic Product w.d.a. (YoY) (2Q P)	14-08-2019	6:00	EUR	-	0.007
Euro-Zone Employment (QoQ) (2Q P)	14-08-2019	9:00	EUR	-	0.003
Euro-Zone Employment (YoY) (2Q P)	14-08-2019	9:00	EUR	-	0.013
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q P)	14-08-2019	9:00	EUR	-	0.002
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q P)	14-08-2019	9:00	EUR	-	0.011
Euro-Zone Industrial Production s.a. (MoM) (JUN)	14-08-2019	9:00	EUR	-	0.009
Euro-Zone Industrial Production w.d.a. (YoY) (JUN)	14-08-2019	9:00	EUR	-	(0.005)
Consumer Price Index (MoM) (JUL)	14-08-2019	8:30	GBP	-	0
Consumer Price Index (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.02
Core Consumer Price Index (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.018
CPIH (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.019
House Price Index (YoY) (JUN)	14-08-2019	8:30	GBP	-	0.012
Producer Price Index Input n.s.a. (MoM) (JUL)	14-08-2019	8:30	GBP	-	(0.014)
Producer Price Index Input w.d.a. (YoY) (JUL)	14-08-2019	8:30	GBP	-	(0.002)



Producer Price Index Output Core n.s.a. (MoM) (JUL)	14-08-2019	8:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.017
Producer Price Index Output n.s.a. (MoM) (JUL)	14-08-2019	8:30	GBP	-	(0.001)
Producer Price Index Output n.s.a. (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.016
Retail Price Index (JUL)	14-08-2019	8:30	GBP	-	289.6
Retail Price Index (MoM) (JUL)	14-08-2019	8:30	GBP	-	0.001
Retail Price Index (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.029
Retail Price Index Ex Mort Int.Payments (YoY) (JUL)	14-08-2019	8:30	GBP	-	0.028
MBA Mortgage Applications (AUG 9)	14-08-2019	11:00	USD	-	0.053
Export Price Index (MoM) (JUL)	14-08-2019	12:30	USD	-	(0.007)
Export Price Index (YoY) (JUL)	14-08-2019	12:30	USD	-	(0.016)
Import Price Index (MoM) (JUL)	14-08-2019	12:30	USD	-	(0.009)
Import Price Index (YoY) (JUL)	14-08-2019	12:30	USD	-	(0.02)
Import Price Index ex Petroleum (MoM) (JUL)	14-08-2019	12:30	USD	-	(0.004)
DOE Cushing OK Crude Inventory (AUG 9)	14-08-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 9)	14-08-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 9)	14-08-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 9)	14-08-2019	14:30	USD	-	-

..... End of Report

