



14 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,370	0.0 %	11.3 %
BSE SENSEX	37,718	0.8 %	14.0 %
CNX BANK	26,819	0.0 %	10.2 %
CNX MIDCAP	19,047	0.0 %	(0.3) %
CNX SMALLCAP	7,281	0.0 %	(8.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,146	0.6 %	5.3 %
S&P 500	2,904	0.5 %	7.7 %
FTSE 100	7,282	(0.4) %	(4.8) %
HANG SENG	27,014	2.5 %	(11.5) %
NIKKEI	22,821	1.0 %	(2.9) %
SHANGHAI COMPOSITE	2,687	1.2 %	(19.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.19	(0.7) %	13.4 %
EUR/USD	1.16	0.4 %	(3.1) %
GBP/USD	1.30	0.3 %	(3.5) %
USD/JPY	111.38	(0.1) %	(1.2) %
USD/AUD	1.39	(1.2) %	8.8 %
USD/SGD	1.37	(0.4) %	2.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.0 %	14.7 %
Gold(INR/10g)	30,478	(0.4) %	3.8 %
Gold Comex(USD/oz)	1,199	(0.1) %	(8.4) %
SILVER(INR/1Kg)	36,547	(0.4) %	(5.3) %
Aluminium(USD/MT)	2,035	0.0 %	(9.8) %
Copper(USD/MT)	5,849	0.0 %	(18.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

Global Economy: The US Labor Department said its consumer price index rose by 0.2% in August, matching the increase seen in July. Excluding food and energy prices, core consumer prices edged up by 0.1% in August after rising by 0.2% for three straight months. A report released by the Federal Reserve on Wednesday said the US economy expanded at a moderate pace through the end of August. The European Central Bank left its interest rates unchanged on Thursday and maintained the forward guidance on monetary stimulus for a second policy session in a row.

Global Equities: US stock rose Thursday, with the S&P 500 extending its uptick to a fourth straight session. The technology stocks led the gains yet again. The Trump administration is giving Beijing another chance to try to stave off new tariffs on \$200 billion in Chinese exports, bringing some calm to the recent flare up in trade worries.

Indian Economy: India's industrial production (base year 2011-12=100) growth remained nearly flat and healthy at 6.6% in July 2018, compared with 6.9% growth recorded in June 2018. The industrial production growth for June 2018 has been revised marginally downwards from 7% increase reported provisionally. The all-India general CPI inflation dipped 3.69% in August 2018 (new base 2012=100), compared with 4.17% in July 2018. The corresponding provisional inflation rate for rural area was 3.41% and urban area 3.99% in August 2018 as against 4.11% and 4.32% in July 2018. The core CPI inflation declined to 5.90% in August 2018 compared with 6.29% in July 2018.

Equity Markets: Local stocks saw some bargain buying after recent losses. Key equity indices edged higher on Wednesday after two consecutive sessions of sharp falls. The sentiment, however, was still fragile as the rupee touched a fresh low.

Corporate News: Wipro and Anaplan, a pioneer in Connected Planning, announced a partnership to deliver cloud-based Enterprise Performance Management (EPM) solutions that will simplify and automate core enterprise function for clients, across industry sectors. Dr Reddy's Laboratories announced the launch of Neostigmine Methylsulfate Injection, USP, a therapeutic equivalent generic version of Bloxiverz (Neostigmine Methylsulfate) Injection approved by the U.S. Food and Drug Administration (USFDA). Zensar Technologies has been recognized in Gartner 'Competitive landscape: Consulting and System Integration Service Providers for Robotic Process Automation' authored by Gartner Analysts Arup Roy , Cathy Tornbohm. Jain Irrigation is acquiring ETwater, innovator of intelligent irrigation technology and in the vanguard for creation of the smart irrigation controller.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(192.9)	(5.7)	(25.6)
MF(INR cr)	(76.0)	319.4	363.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,327	38,860	34,140
F&O(INR cr)	2,261,844	1,271,713	919,634

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.2	13.8	14.3
NSE VIX	14.3	14.2	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,819	0.0 %	10.2 %	Energy	15,601	0.8 %	17.4 %
IT	16,054	0.4 %	26.3 %	Pharma	10,392	1.1 %	20.5 %
Metals	3,631	1.5 %	2.6 %	Finance	11,208	0.2 %	9.2 %
Auto	10,693	0.1 %	(3.3) %	PSU	3,042	0.2 %	6.6 %
FMCG	30,828	2.5 %	16.3 %	Real Estate	257	(0.6) %	(13.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
A B B	1,464	5.3 %	13.2 %	Bank of Ba	134	(4.9) %	(5.9) %
Godrej Con	865	4.0 %	16.4 %	ICICI Pru	363	(2.7) %	(5.7) %
Power Grid	194	3.7 %	(0.6) %	Rural Elec	109	(2.6) %	(15.1) %
ITC	307	3.2 %	18.8 %	B H E L	75	(2.6) %	(8.9) %
Adani Port	376	3.1 %	1.7 %	Axis Bank	635	(2.3) %	27.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Fixed Assets Ex Rural YTD (YoY) (AUG)	14-09-2018	2:00	CNY	-	0.055
Industrial Production (YoY) (AUG)	14-09-2018	2:00	CNY	-	0.06
Industrial Production YTD (YoY) (AUG)	14-09-2018	2:00	CNY	-	0.066
Retail Sales (YoY) (AUG)	14-09-2018	2:00	CNY	-	0.088
Retail Sales YTD (YoY) (AUG)	14-09-2018	2:00	CNY	-	0.093
Surveyed Jobless Rate (AUG)	14-09-2018	2:00	CNY	-	0.051
Euro-Zone Labour Costs (YoY) (2Q)	14-09-2018	9:00	EUR	-	0.02
Euro-Zone Trade Balance (euros) (JUL)	14-09-2018	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (JUL)	14-09-2018	9:00	EUR	-	-
BOE's Carney Speaks in Dublin	14-09-2018	10:00	GBP	-	-
Capacity Utilization (MoM) (JUL)	14-09-2018	4:30	JPY	-	(0.022)
Industrial Production (MoM) (JUL F)	14-09-2018	4:30	JPY	-	-
Industrial Production (YoY) (JUL F)	14-09-2018	4:30	JPY	-	-
Export Price Index (MoM) (AUG)	14-09-2018	12:30	USD	-	(0.005)
Export Price Index (YoY) (AUG)	14-09-2018	12:30	USD	-	0.043
Import Price Index (MoM) (AUG)	14-09-2018	12:30	USD	-	0
Import Price Index (YoY) (AUG)	14-09-2018	12:30	USD	-	0.048
Import Price Index ex Petroleum (MoM) (AUG)	14-09-2018	12:30	USD	-	(0.001)
Retail Sales Advance (MoM) (AUG)	14-09-2018	12:30	USD	-	0.005
Retail Sales Control Group (AUG)	14-09-2018	12:30	USD	-	0.005
Retail Sales Ex Auto (MoM) (AUG)	14-09-2018	12:30	USD	-	0.006
Retail Sales Ex Auto and Gas (AUG)	14-09-2018	12:30	USD	-	0.006
Fed Evans Speaks in Fort Wayne, Indiana	14-09-2018	13:00	USD	-	-
Capacity Utilization (AUG)	14-09-2018	13:15	USD	-	0.781
Industrial Production (MoM) (AUG)	14-09-2018	13:15	USD	-	0.001
Manufacturing (SIC) Production (AUG)	14-09-2018	13:15	USD	-	0.003
Business Inventories (JUL)	14-09-2018	14:00	USD	-	0.001
Fed's Rosengren Speaks at Brookings Confernece	14-09-2018	14:00	USD	-	-
U.S. Monthly Inflation (CPI)	14-09-2018	14:00	USD	-	0.02



U. of Mich. 5-10 Yr Inflation (SEP P)	14-09-2018	14:00	USD	-	0.026
U. of Mich. Current Conditions (SEP P)	14-09-2018	14:00	USD	-	110.3
U. of Mich. Expectations (SEP P)	14-09-2018	14:00	USD	-	87.1
U. of Mich. Sentiment (SEP P)	14-09-2018	14:00	USD	-	96.2
Baker Hughes U.S. Rig Count (SEP 14)	14-09-2018	17:00	USD	-	1048

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