



14 Oct.2019

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D  | % YTD    |
|----------------|--------|-------|----------|
| CNX NIFTY      | 11,305 | 0.6 % | (3.1) %  |
| BSE SENSEX     | 38,127 | 0.7 % | (1.9) %  |
| CNX BANK       | 28,043 | 0.1 % | (7.5) %  |
| CNX MIDCAP     | 15,559 | 0.1 % | (15.1) % |
| CNX SMALLCAP   | 5,399  | 0.5 % | (19.9) % |

| GLOBAL INDICES     | LATEST | % 1D  | % YTD  |
|--------------------|--------|-------|--------|
| DOW JONES          | 26,817 | 1.2 % | 15.0 % |
| S&P 500            | 2,970  | 1.1 % | 18.5 % |
| FTSE 100           | 7,247  | 0.8 % | 7.6 %  |
| HANG SENG          | 26,308 | 2.3 % | 4.7 %  |
| NIKKEI             | 21,799 | 1.2 % | 11.4 % |
| SHANGHAI COMPOSITE | 2,974  | 0.9 % | 20.6 % |

**FOREX RATES**

|         | LATEST | % 1D    | % YTD   |
|---------|--------|---------|---------|
| USD/INR | 70.68  | (0.1) % | 1.8 %   |
| EUR/USD | 1.10   | 0.2 %   | (3.7) % |
| GBP/USD | 1.26   | 2.1 %   | (1.4) % |
| USD/JPY | 108.25 | 0.6 %   | (1.3) % |
| USD/AUD | 1.47   | (0.5) % | 3.7 %   |
| USD/SGD | 1.37   | (0.3) % | 0.7 %   |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD   |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 55     | 1.5 %   | 17.5 %  |
| Gold(INR/10g)      | 38,154 | (0.5) % | 21.0 %  |
| Gold Comex(USD/oz) | 1,494  | (0.5) % | 15.7 %  |
| SILVER(INR/1Kg)    | 45,257 | (1.0) % | 18.3 %  |
| Aluminium(USD/MT)  | 1,721  | (1.0) % | (7.4) % |
| Copper(USD/MT)     | 5,763  | 1.1 %   | (1.3) % |

**FIXED INCOME**

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.7    | 0.1 %  | (0.9) % |

**Global Economy:** The University of Michigan released its preliminary data showing a continued improvement in US consumer sentiment in the month of October. The report said the consumer sentiment index climbed to 96.0 in October after rising to 93.2 in September. The consumer sentiment index continued to recover after plummeting to a nearly three-year low of 89.8 in August. Germany's consumer price inflation slowed to 1.2% in September from 1.4% in August, final data from Destatis showed. This was the lowest rate since February 2018, when the rate was 1.1%. The statistical office confirmed the preliminary estimate published on September 30. Energy prices were down 1.1% in September, while food prices advanced 1.3%. Excluding energy, inflation was 1.4%. On a monthly basis, overall consumer prices remained flat as published earlier.

**Global Equities:** The US President Donald Trump announced that the two economic superpowers have reached a very substantial phase one trade deal which includes up to \$40 to \$50 billion in Chinese purchases of US agricultural products as well as Chinese concessions on intellectual property and financial services.

**Indian Economy:** India's industrial production (base year 2011-12=100) declined 1.1% in August 2019, while snapping consistent growth for last 25 straight months. Also, the pace of decline in industrial production was highest in August 2019 for 2011-12 base year data. As per the revised data for industrial production of July 2019, the growth is higher at 4.6% compared with 4.3% growth reported provisionally. The domestic automobile industry produced a total 14,427,724 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycle in April-September 2019 as against 16,645,330 in April-September 2018, registering a de-growth (-) 13.32 percent over the same period last year, according to a latest monthly update from the Society of Indian Automobile Manufacturers (SIAM). The sale of Passenger Vehicles declined by (-) 23.56 percent in April-September 2019 over the same period last year. The Scheduled commercial banks (SCBs) credit growth moderated to single digit and 24-months low of 8.79% YoY to Rs 9771310 crore as on 27 September 2019, compared with 10.38% growth a fortnight ago.

**Equity Markets:** Local equity barometers ended with modest gains on Friday amid positive global cues fueled by hopes of a trade deal between the US and China. The barometer index, the BSE Sensex, rose 246.68 points or 0.65% to 38,127.08. The Nifty 50 index rose 66.70 points or 0.59% to 11,301.25.

**Corporate News:** IT major Infosys reported a 6% sequential rise in net profit to Rs 4,019 crore while revenues increased to Rs 22,629 crore, a growth of 3.8% on a sequential basis. Infosys also raised the lower end of FY20 revenue guidance. Cadila Healthcare Limited announced today that the USFDA inspected its Active Pharmaceutical Ingredients (API) manufacturing facility at Dabhasa, the group's largest API manufacturing site, from 7th to 11th October 2019. This was a CGMP audit and a pre-approval inspection (PAI). At the end of the inspection, no observation (483) is issued. Indian Railway Catering and Tourism Corporation (IRCTC), which recently concluded its Rs 645-crore initial public offering, will make its stock market debut on Monday.



### FUND FLOWS

|             | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (11.2)        | (109.3)    | 5.2        |
| MF(INR cr)  | (110.2)       | 509.8      | 417.0      |

### MARKET TURNOVER

|              | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 39,626        | 33,680         | 35,276         |
| F&O(INR cr)  | 949,607       | 1,651,085      | 1,344,340      |

### MARKET VOLATILITY

|          | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0          | 17.8           | 15.7           |
| NSE VIX  | 17.1          | 17.3           | 17.4           |

### NSE INDICES / SECTORAL PERFORMANCE

|        | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |             | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks  | 28,043        | 0.1 %       | (7.5) %      | Energy      | 15,511        | (0.4) %     | (6.2) %      |
| IT     | 15,322        | 1.5 %       | (3.3) %      | Pharma      | 7,278         | 0.6 %       | (22.4) %     |
| Metals | 2,337         | 2.4 %       | (24.7) %     | Finance     | 12,769        | 0.4 %       | 2.2 %        |
| Auto   | 7,397         | 0.5 %       | (12.1) %     | PSU         | 2,167         | 0.7 %       | (36.0) %     |
| FMCG   | 30,416        | 0.9 %       | 0.7 %        | Real Estate | 247           | 1.0 %       | (7.4) %      |

### 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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Bandhan Ba         | 584           | 15.2 %      | 10.1 %       | Aurobindo         | 439           | (5.6) %     | (44.6) %     |
| Indiabulls         | 210           | 7.4 %       | (75.2) %     | Yes Bank          | 40            | (3.3) %     | (85.6) %     |
| Cipla              | 441           | 4.5 %       | (16.0) %     | I O C L           | 143           | (3.2) %     | (9.6) %      |
| Vedanta            | 147           | 4.2 %       | (22.2) %     | Vodafone I        | 6             | (3.2) %     | (66.2) %     |
| Infosys            | 815           | 4.1 %       | 7.9 %        | Interglobe        | 1,750         | (2.3) %     | 23.5 %       |

### EVENTS CALENDAR

| <i>EVENT</i>         | <i>DATE</i> | <i>TIME(GMT)</i> | <i>REGION</i> | <i>ACTUAL</i> | <i>PREVIOUS VALUE</i> |
|----------------------|-------------|------------------|---------------|---------------|-----------------------|
| <b>No Data Found</b> |             |                  |               |               |                       |

..... End of Report .....