



15 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,814	0.1 %	5.9 %
BSE SENSEX	35,600	(0.4) %	7.1 %
CNX BANK	26,558	(0.0) %	9.2 %
CNX MIDCAP	18,974	0.2 %	(0.6) %
CNX SMALLCAP	7,740	0.4 %	(2.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,175	(0.1) %	1.4 %
S&P 500	2,782	0.3 %	3.2 %
FTSE 100	7,766	0.8 %	1.5 %
HANG SENG	30,440	(0.9) %	(0.2) %
NIKKEI	22,739	(1.0) %	(3.3) %
SHANGHAI COMPOSITE	3,044	(0.2) %	(9.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	67.63	0.2 %	6.2 %
EUR/USD	1.16	(1.6) %	(3.7) %
GBP/USD	1.33	(0.8) %	(1.9) %
USD/JPY	110.60	0.0 %	(1.9) %
USD/AUD	1.34	1.4 %	4.8 %
USD/SGD	1.34	0.6 %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	0.4 %	10.8 %
Gold(INR/10g)	31,049	2.2 %	5.8 %
Gold Comex(USD/oz)	1,305	0.2 %	(0.3) %
SILVER(INR/1Kg)	41,008	1.3 %	6.2 %
Aluminium(USD/MT)	2,278	(0.0) %	1.0 %
Copper(USD/MT)	7,197	(0.1) %	0.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.1) %	0.5 %

Global Economy: The European Central Bank (ECB) pledged to keep interest rates at present. The ECB main rate was held at 0.00% while the deposit facility rate was kept at -0.40%. Rates will remain at record lows until at least mid-2019 while the QE bond buying programme will finish at end of year. The bank said it would continue to purchase 30 billion euros a month of bonds through the end of September, as planned. It then plans to cut purchases to 15 billion euros a month through the end of December. Chinese industrial production grew 6.8% in May- slower than the 7% increase logged a month ago, the National Bureau of Statistics reported. The retail sales growth also eased to 8.5% from 9.4%. During the January to May period, fixed asset investment increased (FAI) 6.1% -down from 7% for January-April. Private investment rose at a faster rate than overall growth though. FAI by the private sector rose 8.1% year on year in January-May, up 1.3 percentage points from the growth in the same period last year. UK retail sales growth accelerated more than expected in May, figures from the Office for National Statistics revealed Thursday. Retail sales volume including auto fuel, grew 1.3% month-on-month, following April's 1.8% increase. This was the second consecutive rise in sales. Germany's consumer price inflation accelerated to 2.2% year-on-year in May, faster than the 1.6% increase in previous month.

Global Equities: A tepid set of economic numbers from China weighed on global markets.

Indian Economy: Pressure on domestic wholesale price steepened. India's wholesale inflation recorded a jump of 4.43% in May, recording its 14-month high on elevated food and fuel prices, latest price data released by the commerce and industry ministry showed. The Wholesale Price Index (WPI) had witnessed a growth of 3.18% in April and 2.26% in May 2017. Primary articles, which accounts for more than a fifth of the entire wholesale price index grew 3.16 percent in May from following 1.41% rise in April. Fuel and power inflation, which has a weightage of around 13% in WPI, rose at 11.22% in May from 7.85% in April.

Equity Markets: Domestic stocks logged modest losses weighed by negative global cues after the US Federal Reserve raised interest rates and struck a hawkish tone in its latest policy statement. India's wholesale inflation rising to a 14-month high in May also hurt sentiment. Domestic stocks edged lower in early trade tracking negative Asian stocks after the US Federal Reserve struck a hawkish tone in its latest policy statement.

Corporate News: Larsen & Toubro (L&T) said it has won orders worth Rs 1,391 crore across business segments. The order has been bagged by its wholly owned subsidiary L&T Hydrocarbon Engineering Limited (LTHE), Larsen & Toubro said in a statement. A firm undertone in global crude oil prices could keep local Oil Marketing Companies under check today.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	25.8	7.3	(45.1)
MF(INR cr)	98.3	244.1	484.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,263	28,555	33,462
F&O(INR cr)	1,418,957	817,534	813,918

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	12.5	15.4
NSE VIX	12.1	12.9	13.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,562	(0.3) %	9.2 %	Energy	13,976	(0.1) %	5.2 %
IT	13,825	(1.5) %	8.8 %	Pharma	9,112	1.8 %	5.7 %
Metals	3,597	(0.4) %	1.6 %	Finance	11,011	(0.4) %	7.3 %
Auto	11,243	0.1 %	1.7 %	PSU	3,100	(1.4) %	8.6 %
FMCG	28,885	(0.1) %	9.0 %	Real Estate	292	0.0 %	(1.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Aurobindo	609	4.2 %	2.9 %	Infosys	1,240	(2.8) %	9.0 %
Lupin	900	3.2 %	15.8 %	B H E L	76	(2.6) %	(7.8) %
Sun Pharma	559	2.4 %	10.1 %	Bharat Ele	116	(2.6) %	(19.8) %
Idea Cellu	63	2.1 %	(19.3) %	Sun TV Net	912	(2.2) %	6.1 %
Marico	344	2.1 %	4.8 %	Adani Port	374	(2.2) %	1.3 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Ellis Gives Speech in Sydney	15-06-2018	3:30	AUD	-	-
International Securities Transactions (Canadian dollar) (APR)	15-06-2018	12:30	CAD	-	-
Manufacturing Sales (MoM) (APR)	15-06-2018	12:30	CAD	-	0.014
Existing Home Sales (MoM) (MAY)	15-06-2018	13:00	CAD	-	(0.029)
KOF Institute Summer Economic Forecast	15-06-2018	8:00	CHF	-	-
New Home Prices (MoM) (MAY)	15-06-2018	1:30	CNY	-	0.006
EU 25 New Car Registrations (MAY)	15-06-2018	6:00	EUR	-	0.096
ECB Executive Board Member Coeure Speaks in Paris	15-06-2018	8:45	EUR	-	-
Euro-Zone Consumer Price Index (MoM) (MAY)	15-06-2018	9:00	EUR	-	0.003
Euro-Zone Consumer Price Index (YoY) (MAY F)	15-06-2018	9:00	EUR	-	0.012
Euro-Zone Consumer Price Index Core (YoY) (MAY F)	15-06-2018	9:00	EUR	-	0.011
Euro-Zone Labour Costs (YoY) (1Q)	15-06-2018	9:00	EUR	-	0.015
Euro-Zone Trade Balance (euros) (APR)	15-06-2018	9:00	EUR	-	-
Euro-Zone Trade Balance s.a. (APR)	15-06-2018	9:00	EUR	-	-
Non Resident Bond Holdings (MAY)	15-06-2018	3:00	NZD	-	0.598
Empire Manufacturing (JUN)	15-06-2018	12:30	USD	-	20.1
Capacity Utilization (MAY)	15-06-2018	13:15	USD	-	0.78
Industrial Production (MoM) (MAY)	15-06-2018	13:15	USD	-	0.007
Manufacturing (SIC) Production (MAY)	15-06-2018	13:15	USD	-	0.005
U. of Mich. 1 Yr Inflation (JUN P)	15-06-2018	14:00	USD	-	0.028
U. of Mich. 5-10 Yr Inflation (JUN P)	15-06-2018	14:00	USD	-	0.025
U. of Mich. Current Conditions (JUN P)	15-06-2018	14:00	USD	-	111.8
U. of Mich. Expectations (JUN P)	15-06-2018	14:00	USD	-	89.1
U. of Mich. Sentiment (JUN P)	15-06-2018	14:00	USD	-	98
Baker Hughes U.S. Rig Count (JUN 15)	15-06-2018	17:00	USD	-	1062
Fed's Kaplan Speaks in Fort Worth	15-06-2018	17:30	USD	-	-
Net Long-term TIC Flows (APR)	15-06-2018	20:00	USD	-	-
Total Net TIC Flows (APR)	15-06-2018	20:00	USD	-	-



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