



15 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,615	0.5 %	(0.5) %
BSE SENSEX	38,736	(0.2) %	0.4 %
CNX BANK	30,689	0.3 %	1.2 %
CNX MIDCAP	17,180	0.2 %	(6.3) %
CNX SMALLCAP	6,092	0.2 %	(9.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,332	0.9 %	17.2 %
S&P 500	3,014	0.5 %	20.2 %
FTSE 100	7,506	(0.1) %	11.5 %
HANG SENG	28,472	0.1 %	13.3 %
NIKKEI	21,686	0.2 %	10.9 %
SHANGHAI COMPOSITE	2,931	0.4 %	18.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.24	(0.2) %	(1.7) %
EUR/USD	1.13	0.3 %	(1.6) %
GBP/USD	1.25	0.4 %	(1.7) %
USD/JPY	108.23	(0.4) %	(1.3) %
USD/AUD	1.43	(0.5) %	0.9 %
USD/SGD	1.36	(0.3) %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	60	(0.2) %	29.8 %
Gold(INR/10g)	34,407	(0.5) %	9.1 %
Gold Comex(USD/oz)	1,418	0.5 %	9.8 %
SILVER(INR/1Kg)	37,733	(0.5) %	(1.4) %
Aluminium(USD/MT)	1,800	(0.4) %	(3.1) %
Copper(USD/MT)	5,950	0.4 %	1.9 %

FIXED INCOME

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

Global Economy: China's gross domestic product expanded a seasonally adjusted 1.6% on quarter in the second quarter of 2019, and was up from 1.4% in Q1. On an annualized yearly basis, GDP climbed 6.2%, down from 6.4% in the three months prior. The industrial production jumped 6.3% on year in June. Retail sales advanced an annual 9.8% in June, up from 8.6% in the previous month. Fixed asset investment also advanced 5.8% on year, up from 5.6% a month earlier. The US Labor Department released a report on Friday showing US producer prices edged higher in the month of June. The Labor Department said its producer price index for final demand inched up by 0.1% in June, matching the uptick seen in May. Excluding food and energy prices, however, core producer prices rose by 0.3% in June after rising by 0.2% in May.

Global Equities: Extending the upward trend seen over the past few sessions, the US stocks jumped to fresh record highs on Friday. The Dow rose 243.95 points or 0.9% to 27,332.03, the Nasdaq added 48.10 points or 0.6% to 8,244.14 and the S&P 500 rose 13.86 points or 0.5% to 3,013.77.

Indian Economy: India's industrial production (base year 2011-12=100) rose at slower pace of 3.1% in May 2019, while showing moderation in growth from a six-month high of 4.3% in April 2019. However, the industrial production growth for April 2019 has been revised sharply upwards to 4.3% from 3.4% as reported provisionally. The all-India general CPI inflation rose to 3.18% in June 2019 (new base 2012=100), compared with 3.05% in May 2019. The corresponding provisional inflation rate for rural area was 2.21% and urban area 4.33% in June 2019, as against 1.86% and 4.51% in May 2019. The core CPI inflation eased to 4.09% in June 2019 compared with 4.23% in May 2019. The cumulative CPI inflation has declined to 3.07% in April-June FY2020 compared with 4.79% in April-June FY2019.

Equity Markets: Local stocks extended losses in last session. Heavy selling in the last hour of the session dragged benchmark indices lower. The Nifty gave up 11,600 level and closed just above 11,550 mark. Investors turned cautious ahead of Infosys' Q1 earnings and India's economic data.

Corporate News: IT major Infosys announced that its net profit fell 6.8% to Rs 3802 crore on 1.23% increase in revenue from operations to Rs 21803 crore in Q1 June 2019 over Q4 March 2019. Operating profit fell 3.2% to Rs 4471 crore in Q1 June 2019 over Q4 March 2019. Operating margin was 20.5% in Q1 June 2019. The company has increased FY20 revenue growth guidance to 8.5-10% in constant currency, while maintaining FY20 operating margin guidance in range of 21-23%. InterGlobe Aviation after market hours on Friday, 12 July 2019 clarified to a news item titled "IndiGo shareholder pact to be checked by Govt for violations". The company said that it has not received any official communication in relation to the matters referred to in the news report. Avenue Supermarts' consolidated net profit rose 31.87% to Rs 323.09 crore on 26.94% rise in total income to Rs 5825.51 crore in Q1 June 2019 over Q1 June 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(67.1)	(76.4)	57.1
MF(INR cr)	345.7	28.9	103.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,760	31,270	33,984
F&O(INR cr)	756,685	1,184,512	1,225,297

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.4	13.2	14.9
NSE VIX	12.0	13.5	18.9

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,601	(0.4) %	0.9 %	Energy	15,433	(0.7) %	(6.7) %
IT	15,227	0.1 %	(3.9) %	Pharma	8,144	0.4 %	(13.1) %
Metals	2,826	0.8 %	(8.9) %	Finance	13,366	(0.3) %	6.9 %
Auto	7,654	0.0 %	(9.0) %	PSU	3,179	0.2 %	(6.1) %
FMCG	29,252	(0.1) %	(3.1) %	Real Estate	281	0.5 %	5.0 %

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>
United Spi	587	3.7 %	6.9 %	Wipro	259	(3.3) %	(1.0) %
SBI Life I	781	3.5 %	30.5 %	O N G C	150	(2.2) %	(4.8) %
HDFC Life	482	3.0 %	25.5 %	Bajaj Fin.	3,378	(2.1) %	12.5 %
Hero Motoc	2,570	2.5 %	0.4 %	IndusInd B	1,510	(2.1) %	(13.4) %
Vedanta	168	2.4 %	(11.2) %	General In	228	(2.0) %	(7.6) %

EVENTS CALENDAR

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

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