



15 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,473	2.3 %	2.6 %
BSE SENSEX	34,734	2.2 %	4.4 %
CNX BANK	25,396	2.5 %	4.4 %
CNX MIDCAP	16,746	2.9 %	(12.3) %
CNX SMALLCAP	6,025	2.8 %	(24.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,340	1.2 %	2.1 %
S&P 500	2,767	1.4 %	2.6 %
FTSE 100	6,996	(0.2) %	(8.5) %
HANG SENG	25,801	2.1 %	(15.4) %
NIKKEI	22,695	0.5 %	(3.5) %
SHANGHAI COMPOSITE	2,607	0.9 %	(22.1) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.57	(0.8) %	15.5 %
EUR/USD	1.16	(0.3) %	(3.8) %
GBP/USD	1.32	(0.6) %	(2.7) %
USD/JPY	112.20	(0.1) %	(0.5) %
USD/AUD	1.41	0.0 %	9.9 %
USD/SGD	1.38	0.3 %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	(11.1) %	18.2 %
Gold(INR/10g)	31,565	0.8 %	7.5 %
Gold Comex(USD/oz)	1,221	(0.3) %	(6.7) %
SILVER(INR/1Kg)	38,267	0.7 %	(0.9) %
Aluminium(USD/MT)	2,045	1.0 %	(9.4) %
Copper(USD/MT)	6,325	2.8 %	(11.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.0 %	0.7 %

Global Economy: The University of Michigan released a report unexpectedly showing a modest decrease in US consumer sentiment in the month of October. The preliminary report showed the consumer sentiment index dropped to 99.0 in October from the final September reading of 100.1. The report said the current economic conditions index edged down to 114.4 in October from 115.2 in September. China exports grew 14.5% year-on-year in September, faster than the 9.8% increase seen in August, figures from customs administration revealed Friday. At the same time, imports advanced 14.3% annually. As a result, the trade surplus increased to around \$32 billion in September. Eurozone industrial production climbed 1% on a monthly basis in August, reversing 0.7 % drop each in June and July, data from Eurostat revealed Friday. On a yearly basis, industrial production growth advanced to 0.9% from 0.3% in July. Germany's consumer price inflation accelerated 2.3% on year, the fastest since November 2011, when inflation was 2.4%, according to Destatis.

Global Equities: Global risk sentiments are likely to be steady following strong Chinese trade data. US stocks also saw good bargain buying following a two-day sell-off.

Indian Economy: India's consumer price inflation came in at 3.77% versus 3.69% in August, the Central Statistics Office reported Friday. At the same time, food price inflation rose to 0.51% from 0.29% a month ago. On a monthly basis, consumer prices fell 0.07% and food prices declined 1.14% in September. India's industrial production growth slipped to a three month low of 4.3% annually after 6.5% increase in July and 4.8% rise in the same period last year. Manufacturing output showed an annual growth of 4.6%.

Equity Markets: Local stocks rebounded on bargain buying after testing multi month low. India is one of the fastest growing major economies and is currently ranked as the world's sixth largest economy, according to a latest update from the Ministry of Commerce & Industry. Projections of growth, over the medium term, remain encouraging and optimistic for India. The underlying strengths are indicative of the potential of India to achieve a \$5 trillion economy by 2025.

Corporate News: FMCG major Hindustan Unilever reported around 20% year-on-year growth in standalone profit to Rs 1,525 crore, driven by strong volume growth and operational performance. Revenue during the quarter increased 11.1% year-on-year to Rs 9,234 crore with volume growth of 10%. The double-digit sales volume growth continued for a fourth straight quarter. GSS Infotech Inc, wholly owned subsidiary of GSS InfoTech, has signed the Share Purchase Agreement for acquiring 100% shares of Nexii Labs Inc, USA. Nexii Labs Inc shall become a wholly owned step-down subsidiary of the Company. Passenger vehicle sales in India dropped for the third consecutive month in September mostly due to the combined effect of high, soaring domestic fuel prices and rising insurance costs. Domestic Automakers dispatched 292,658 units of cars, utility vehicles and vans in the past month, recording a 5.61% fall from a year earlier, according to data from the Society of Indian Automobile Manufacturers (SIAM). Metal counters are likely to be in focus following the recovery in Copper prices. COMEX Copper futures tested around three week low before recovering on strong Chinese Copper imports data.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(370.3)	(275.4)	(48.3)
MF(INR cr)	1,354.4	1,235.5	455.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,150	41,225	35,360
F&O(INR cr)	634,995	1,119,772	966,321

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.3	17.1	14.3
NSE VIX	18.6	19.0	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,396	2.5 %	4.4 %	Energy	14,243	3.2 %	7.2 %
IT	14,539	(1.0) %	14.4 %	Pharma	9,526	0.4 %	10.5 %
Metals	3,438	4.0 %	(2.9) %	Finance	10,538	2.6 %	2.7 %
Auto	9,084	3.9 %	(17.9) %	PSU	2,704	1.1 %	(5.3) %
FMCG	28,154	2.8 %	6.2 %	Real Estate	210	3.4 %	(29.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Eicher Mot	23,904	6.9 %	(15.5) %	TCS	1,918	(3.1) %	31.9 %
Avenue Sup	1,412	6.5 %	4.0 %	Aurobindo	736	(2.7) %	24.1 %
Interglobe	809	6.3 %	(39.1) %	General In	307	(2.7) %	(17.0) %
Maruti Suz	7,287	6.0 %	(19.1) %	HCL Techno	985	(2.4) %	0.6 %
Bajaj Fin.	2,287	5.8 %	25.8 %	Godrej Con	716	(1.6) %	(3.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Consumer Conf Index (AUG)	15-10-2018	00:30	AUD	-	106.1
Westpac Consumer Confidence (AUG)	15-10-2018	00:30	AUD	-	0.039
Wage Price Index (QoQ) (2Q)	15-10-2018	01:30	AUD	-	0.005
Wage Price Index (YoY) (2Q)	15-10-2018	01:30	AUD	-	0.021
Existing Home Sales (MoM) (JUL)	15-10-2018	13:00	CAD	-	0.041
New Home Prices (MoM) (JUL)	15-10-2018	01:30	CNY	-	0.011
Consumer Price Index (MoM) (JUL)	15-10-2018	08:30	GBP	-	0
Consumer Price Index (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.024
Core Consumer Price Index (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.019
CPIH (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.023
House Price Index (YoY) (JUN)	15-10-2018	08:30	GBP	-	0.03
Producer Price Index Input n.s.a. (MoM) (JUL)	15-10-2018	08:30	GBP	-	0.002
Producer Price Index Input n.s.a. (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.102
Producer Price Index Output Core n.s.a. (MoM) (JUL)	15-10-2018	08:30	GBP	-	0.002
Producer Price Index Output Core n.s.a. (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.021
Producer Price Index Output n.s.a. (MoM) (JUL)	15-10-2018	08:30	GBP	-	0.001
Producer Price Index Output n.s.a. (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.031
Retail Price Index (JUL)	15-10-2018	08:30	GBP	-	281.5
Retail Price Index (MoM) (JUL)	15-10-2018	08:30	GBP	-	0.003
Retail Price Index (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.034
Retail Price Index Ex Mort Int.Payments (YoY) (JUL)	15-10-2018	08:30	GBP	-	0.034
BOJ Outright Bond Purchase 10~25 Years	15-10-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	15-10-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	15-10-2018	01:10	JPY	-	-
Adjusted Merchandise Trade Balance (Yen) (JUL)	15-10-2018	23:50	JPY	-	-
Exports (YoY) (JUL)	15-10-2018	23:50	JPY	-	0.067
Foreign Buying Japan Bonds (AUG 10)	15-10-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (AUG 10)	15-10-2018	23:50	JPY	-	-
Imports (YoY) (JUL)	15-10-2018	23:50	JPY	-	0.025



Japan Buying Foreign Bonds (Yen) (AUG 10)	15-10-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 10)	15-10-2018	23:50	JPY	-	-
Trade Balance (JUL)	15-10-2018	23:50	JPY	-	-
MBA Mortgage Applications (AUG 10)	15-10-2018	11:00	USD	-	-
Empire Manufacturing (AUG)	15-10-2018	12:30	USD	-	22.6
Nonfarm Productivity (2Q P)	15-10-2018	12:30	USD	-	0.004
Retail Sales Advance (MoM) (JUL)	15-10-2018	12:30	USD	-	0.005
Retail Sales Control Group (JUL)	15-10-2018	12:30	USD	-	0
Retail Sales Ex Auto (MoM) (JUL)	15-10-2018	12:30	USD	-	0.004
Retail Sales Ex Auto and Gas (JUL)	15-10-2018	12:30	USD	-	0.003
Unit Labor Costs (2Q P)	15-10-2018	12:30	USD	-	0.029
Capacity Utilization (JUL)	15-10-2018	13:15	USD	-	0.78
Industrial Production (MoM) (JUL)	15-10-2018	13:15	USD	-	0.006
Manufacturing (SIC) Production (JUL)	15-10-2018	13:15	USD	-	0.008
Business Inventories (JUN)	15-10-2018	14:00	USD	-	0.004
NAHB Housing Market Index (AUG)	15-10-2018	14:00	USD	-	68
DOE Cushing OK Crude Inventory (AUG 10)	15-10-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (AUG 10)	15-10-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 10)	15-10-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 10)	15-10-2018	14:30	USD	-	-
Net Long-term TIC Flows (JUN)	15-10-2018	20:00	USD	-	-
Total Net TIC Flows (JUN)	15-10-2018	20:00	USD	-	-

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