



15 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,370	0.3 %	(2.6) %
BSE SENSEX	38,214	0.2 %	(1.3) %
CNX BANK	28,313	0.5 %	(6.6) %
CNX MIDCAP	15,560	(0.2) %	(15.1) %
CNX SMALLCAP	5,401	(0.0) %	(19.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,787	(0.1) %	14.8 %
S&P 500	2,966	(0.1) %	18.3 %
FTSE 100	7,213	(0.5) %	7.1 %
HANG SENG	26,522	0.8 %	5.5 %
NIKKEI	21,799	1.2 %	11.4 %
SHANGHAI COMPOSITE	3,008	1.2 %	22.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.58	(0.2) %	1.7 %
EUR/USD	1.10	0.0 %	(3.6) %
GBP/USD	1.26	0.6 %	(0.8) %
USD/JPY	108.47	0.2 %	(1.1) %
USD/AUD	1.47	(0.0) %	3.6 %
USD/SGD	1.37	0.0 %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	1.5 %	17.5 %
Gold(INR/10g)	38,386	0.6 %	21.7 %
Gold Comex(USD/oz)	1,499	0.3 %	16.1 %
SILVER(INR/1Kg)	45,424	0.4 %	18.7 %
Aluminium(USD/MT)	1,705	(1.0) %	(8.3) %
Copper(USD/MT)	5,719	(0.8) %	(2.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.0) %	(0.9) %

Global Economy: China's exports declined in September reflecting weak global growth and trade disputes with the US administration. In dollar terms, exports fell 3.2% year-on-year in September, data from the General Administration of Customs showed Monday. This followed prior month's 1% fall. At the same time, imports decreased 8.5%. As a result, the trade surplus increased to \$39.65 billion from \$34.83 billion a month ago. Eurozone industrial production expanded in August after easing for two straight months, data from Eurostat showed Monday. Industrial output grew 0.4% month-on-month, offsetting a 0.4% fall in July. This was the first rise in three months. Germany's wholesale prices declined at the fastest pace since mid-2016 in September, data from Destatis revealed on Monday. Wholesale prices fell 1.9% year-on-year in September, following a 1.1% decrease in August. Singapore central bank loosened its monetary policy for the first time since 2016, and signaled more easing if prospects of inflation and growth weaken significantly. Services sector in New Zealand continued to expand in September, albeit at a slower rate, the latest survey from BusinessNZ showed on Monday with a Performance of Services Index score of 54.4. That's down from 54.6 in August.

Global Equities: European stocks eased on uncertainty over Brexit and profit selling after recent gains. Britain and the European Union said over the weekend that plenty of further work would be needed to secure a Brexit agreement.

Indian Economy: World Bank cut its economic growth forecast for India to 6% for the current fiscal from its April projection of 7.5%, citing a broad-based and severe cyclical slowdown. Growth is expected to gradually recover to 6.9% in 2020-21 and to 7.2% the following year, the bank said in its South Asian Economic Focus report released on Sunday. India's cyclical slowdown is severe. According to the World Bank, the Indian growth decelerated by 3 percentage points in the last year and growth in the second quarter of this year was the lowest in over six years. Manufacturing growth fell from over 10% a year ago to below 1% in the second quarter of 2019. This drop follows the global trend but is more pronounced. Minister of Petroleum and Natural Gas & Steel Dharmendra Pradhan has called for inclusion of petroleum products under GST regime. He appealed to the union finance minister to take this up in the GST council and at least make a beginning by including natural gas and ATF in the GST. Wholesale Price Index (WPI)-based inflation, base year 2011-12, dipped further down to 39-months low of 0.3% in September 2019 from 1.1% in August 2019. The WPI based inflation has been moderating consistently for last five straight months from 3.2% in April 2019.

Equity Markets: Key benchmark indices ended with decent gains on Monday. Domestic shares tracked strength in other Asian stock markets which rose after progress on US-China trade talks. The indices, however, sharply pared gains in late trade amid profit selling at higher levels. BSE Sensex rose 87.39 points or 0.23% to 38,214.47. The Nifty 50 index rose 36.10 points or 0.32% to 11,341.15.

Corporate News: IT stocks could benefit from falling Indian Rupee. INR fell yesterday as recent string of poor economic releases hurt the currency. INR closed at 71.23 per US dollar, down 20 paise on the day. Tata Consultancy Services has been voted the Overall Most Outstanding Company in India and the Most Outstanding Company in India in the IT Services sector in Asiamoney's 2019 Asia's Outstanding Companies poll. FMCG major Hindustan Unilever (HUL) on a consolidated basis reported 22.73% rise in net profit to Rs 1814 crore on a 5.2% increase in total income to Rs 10229 crore in Q2 September 2019 over Q2 September 2018. ACC and Wipro will announce their quarterly results today, 15 October 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(80.0)	(105.1)	4.5
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)	2,869	29,829	35,027
F&O(INR cr)	852,896	1,551,311	1,340,559

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.7	15.7
NSE VIX	17.4	17.4	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	28,182	0.5 %	(7.1) %	Energy	15,610	0.6 %	(5.6) %
IT	15,278	(0.3) %	(3.6) %	Pharma	7,362	1.1 %	(21.5) %
Metals	2,360	1.0 %	(23.9) %	Finance	12,791	0.2 %	2.3 %
Auto	7,520	1.7 %	(10.6) %	PSU	2,158	(0.4) %	(36.2) %
FMCG	30,591	0.6 %	1.3 %	Real Estate	252	1.9 %	(5.7) %

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>
Vodafone I	6	6.7 %	(63.9) %	Indiabulls	198	(5.8) %	(76.7) %
DLF	155	6.4 %	(20.8) %	Infosys	786	(3.5) %	4.1 %
Tata Motor	128	5.4 %	(31.8) %	Bank of Ba	88	(2.8) %	(33.5) %
O N G C	135	4.8 %	(14.0) %	Bandhan Ba	569	(2.5) %	7.3 %
Tata Motor	56	4.7 %	(38.9) %	Bajaj Fin.	3,883	(2.3) %	29.4 %

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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