



16 Jul.2018

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,994	(0.2) %	7.7 %
BSE SENSEX	36,542	(0.0) %	9.9 %
CNX BANK	26,776	(0.6) %	10.1 %
CNX MIDCAP	18,039	(1.2) %	(5.5) %
CNX SMALLCAP	7,092	(1.6) %	(10.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,019	0.4 %	0.8 %
S&P 500	2,801	0.1 %	3.9 %
FTSE 100	7,662	0.1 %	0.2 %
HANG SENG	28,525	0.2 %	(6.5) %
NIKKEI	22,597	1.9 %	(3.9) %
SHANGHAI COMPOSITE	2,831	(0.2) %	(15.4) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.53	(0.1) %	7.6 %
EUR/USD	1.17	0.2 %	(2.7) %
GBP/USD	1.32	0.3 %	(2.2) %
USD/JPY	112.38	(0.3) %	(0.3) %
USD/AUD	1.35	(0.2) %	5.3 %
USD/SGD	1.37	0.2 %	2.3 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	2.1 %	18.9 %
Gold(INR/10g)	30,080	(0.2) %	2.5 %
Gold Comex(USD/oz)	1,242	(0.4) %	(5.1) %
SILVER(INR/1Kg)	38,649	(0.3) %	0.1 %
Aluminium(USD/MT)	2,102	(0.1) %	(6.8) %
Copper(USD/MT)	6,166	(0.1) %	(14.1) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

**Global Economy:** Indicating concerns about the potential impact of tariffs, the University of Michigan released a report on Friday showing an unexpected deterioration in US consumer sentiment in the month of July. The preliminary report said the consumer sentiment index dipped to 97.1 in July from the final June reading of 98.2. China gross domestic product climbed a seasonally adjusted 1.8% on quarter in the second quarter of 2018, the National Bureau of Statistics said on Monday, following the rise of 1.4% in the three months prior. It was the strongest quarterly expansion since the September quarter 2017. Year-on-year, the economy advanced 6.7% year-on-year in the June quarter of 2018, after a 6.8% growth in the previous three quarters. It was the weakest pace of expansion since the third quarter of 2016.

**Global Equities:** US stocks turned higher on Friday as the Nasdaq hit a new record high and the S&P 500 edged up to its best closing level in five months.

**Indian Economy:** India's exports during June 2018 were valued at US \$ 27.70 Billion as compared to US \$ 23.56 Billion during June 2017 exhibiting a positive growth of 17.57%. In Rupee terms, exports were valued at Rs. 187800.20 crore in June 2018 as compared to Rs. 151844.56 crore during June 2017, registering a positive growth of 23.68%. Imports during June 2018 were valued at US\$ 44.30 Billion (Rs 300351.83 crore) which was 21.31% higher in Dollar terms and 27.61% higher in Rupee terms over the level of imports valued at US\$ 36.52 Billion (Rs. 235361.85 crore) in June 2017. Taking merchandise and services together, overall trade deficit for April-June 2018-19 is estimated at US\$ 32.32 Billion as compared to US\$ 28.55 Billion during April-June 2017-18.

**Equity Markets:** Key benchmark indices settled with small losses in a volatile session of trade. The barometer index, the S&P BSE Sensex, fell 6.78 points or 0.02% to settle at 36,541.63. The Nifty 50 index fell 4.30 points or 0.04% to settle at 11,018.90. Volatility was high as stocks reacted to inflation data that rose less than expected while IIP fell more than expectations. Domestic stocks nudged higher in early trade on positive Asian stocks. The Sensex trimmed gains soon after scaling a record high while the Nifty sank in negative zone in morning trade.

**Corporate News:** Infosys' net profit declined 2.1% to Rs 3612 crore on 5.8% rise in revenues to Rs 19128 crore in Q1 June 2018 over Q4 March 2018. Financial year ending March 2018 revenue guidance in constant currency was retained at 6%-8%, while operating margin guidance was retained at 22%-24%. Infosys board of directors also considered, approved and recommended a bonus issue of one equity share for every equity share held and a stock dividend of one American Depositary Share (ADS) for every ADS held, as on a record date to be determined. Aurobindo Pharma announced the signing of a definitive agreement to acquire from Apotex International Inc. (Apotex), its commercial operations and certain supporting infrastructure in five European countries. The acquisition is in line with Aurobindo's strategy to strengthen and grow its European business and to expand in Eastern Europe. Bajaj Corp's net profit declined 2.2% to Rs 53.77 crore on 6.76% rise in total income to Rs 222.58 crore in Q1 June 2018 over Q1 June 2017.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(137.3)	(19.2)	(40.5)
MF(INR cr)	14.4	232.4	477.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,788	30,038	32,633
F&O(INR cr)	558,122	808,226	833,178

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.2	14.0	15.1
NSE VIX	12.3	12.6	13.3

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,936	(0.3) %	10.7 %	Energy	14,289	0.9 %	7.5 %
IT	14,535	0.1 %	14.4 %	Pharma	9,164	(0.9) %	6.3 %
Metals	3,287	(0.4) %	(7.1) %	Finance	11,259	(0.0) %	9.7 %
Auto	11,003	(0.3) %	(0.5) %	PSU	2,765	(2.0) %	(3.1) %
FMCG	29,630	(1.0) %	11.8 %	Real Estate	267	(1.7) %	(10.0) %

### 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>
Titan Comp	839	3.7 %	(11.2) %	Zee Entert	509	(4.7) %	(12.1) %
Shriram Tr	1,254	3.3 %	(14.6) %	Rural Elec	96	(3.9) %	(24.7) %
B P C L	387	2.5 %	(8.7) %	Power Fin.	71	(3.7) %	(18.9) %
Bajaj Fin.	2,469	2.2 %	35.7 %	Bharti Inf	303	(3.6) %	(10.4) %
Infosys	1,317	1.8 %	15.9 %	L&T Fin.Ho	147	(3.6) %	(8.2) %

### 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>					

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