



16 Sep.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,021	(0.5) %	(5.6) %
BSE SENSEX	37,385	0.8 %	(4.4) %
CNX BANK	27,972	(0.5) %	(7.8) %
CNX MIDCAP	15,950	(0.1) %	(13.0) %
CNX SMALLCAP	5,602	(0.3) %	(16.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,220	0.1 %	16.7 %
S&P 500	3,007	(0.1) %	20.0 %
FTSE 100	7,367	0.3 %	9.4 %
HANG SENG	27,353	1.0 %	8.8 %
NIKKEI	21,988	1.1 %	12.4 %
SHANGHAI COMPOSITE	3,031	0.8 %	23.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.58	(0.3) %	3.1 %
EUR/USD	1.10	(0.2) %	(3.8) %
GBP/USD	1.23	(0.0) %	(3.2) %
USD/JPY	107.75	0.3 %	(1.7) %
USD/AUD	1.46	(0.1) %	2.5 %
USD/SGD	1.38	(0.0) %	1.1 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(0.3) %	17.8 %
Gold(INR/10g)	37,592	(0.2) %	19.2 %
Gold Comex(USD/oz)	1,4961,582.6	15.9 %	15.9 %
SILVER(INR/1Kg)	46,250	(0.8) %	20.9 %
Aluminium(USD/MT)	1,768	(0.3) %	(4.8) %
Copper(USD/MT)	5,870	0.5 %	0.5 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

**Global Economy:** The US Commerce Department said retail sales rose by 0.4% in August after rising by an upwardly revised 0.8% in July. After reporting a substantial deterioration in U.S.consumer sentiment in the previous month, the University of Michigan released preliminary data on Friday showing sentiment has rebounded by more than anticipated in the month of September. The report said the consumer sentiment index rose to 92 in September after plunging to a three-year low of 89.8 in August. The Commerce Department said business inventories climbed by 0.4% in July after coming in unchanged in June. The euro area trade surplus increased in July on higher exports, data from Eurostat showed. The trade surplus rose to a seasonally adjusted EUR 19 billion from EUR 17.7 billion in June. Exports rose 0.6% in July from June, while imports remained stable. Germany's wholesale prices declined at the fastest pace in three years in August, data from Destatis showed. Wholesale prices decreased 1.1% year-on-year in August, the biggest fall since August 2016.

**Global Equities:** US stocks ended on a mixed note following the strong upward move seen over the two previous sessions.

**Indian Economy:** The inflation is under control and there is a clear sign of revival of Industrial production,noted the Union Minister N Sitharaman as she announced a plethora of sops to boost economic growth. Annual and Quarter wise fixed investment rates show revival, she noted. Foreign Direct Investment (FDI) inflows are robust as of now and there is a sign of revival. Government announced new measures to boost housing and facilitate home buyers. External Commercial Borrowing guidelines to be relaxed and the government is encouraging Govt Servants to buy houses. With a focus on construction of unfinished units government announces special window to provide last mile funding for housing projects which are non-NPA and non-NCLT and are net worth positive in affordable and middle income category. This will be set up with a fund size of Rs 10,000 crore funded by the government. The window will be run by complete professional drawn from marketplace and domain specialists like banking or housing finance specialists. For enhancing exports,the Government announces setting up of FTA Utilisation Mission headed by a senior officer in Dept of Commerce, to work with FIEO and export houses to utilise concessional tariffs in each FTA. Export Credit Guarantee Corp will expand scope of ECIS and offer higher insurance cover to banks' lending working capital for exports in a move which will cost Rs 1700 crores per annum to the government.

**Equity Markets:** Key equity benchmarks ended the volatile session with strong gains on Friday. Rate sensitive banks, realty and auto stocks were in demand. Investor sentiment got a boost as improving US-China trade relations and a rate cut from the European Central Bank (ECB) eased fears of a global economic slowdown. The 50-unit Nifty opened lower and dropped below 11,000 level in morning trade. Buying resumed in the afternoon trade,which pushed the index above 11,000. The index, however, failed to cross 11,100 mark.

**Corporate News:** Local oil marketing companies would be in focus after a major drone attacks on two Saudi Aramco oil facilities in eastern Saudi Arabia. Reliance Industries and UK's BP plc have taken over the 10% shareholding of their partner Niko Resources in the eastern offshore KG-D6 block after the Canadian firm defaulted on paying for its share of gas field development cost. Allahabad Bank board of directors will meet on September 16 to consider amalgamation of Allahabad Bank with Indian Bank.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	365.9	(51.0)	0.0
MF(INR cr)	(197.1)	519.2	390.2

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,021	32,395	34,332
F&O(INR cr)	921,269	1,395,718	1,298,276

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	13.7	16.0	15.6
NSE VIX	14.1	16.1	17.6

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,099	1.0 %	(7.3) %	Energy	14,727	2.2 %	(10.9) %
IT	15,723	0.9 %	(0.7) %	Pharma	8,033	(0.9) %	(14.3) %
Metals	2,444	1.4 %	(21.2) %	Finance	12,513	0.7 %	0.1 %
Auto	7,361	1.1 %	(12.5) %	PSU	2,512	0.2 %	(25.8) %
FMCG	28,592	0.1 %	(5.3) %	Real Estate	268	1.5 %	0.3 %

### 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>
B P C L	409	6.3 %	4.2 %	Piramal En	1,904	(3.1) %	(29.3) %
I O C L	130	4.6 %	(18.0) %	L&T Fin.Ho	93	(2.9) %	(38.6) %
Motherson	108	4.3 %	(30.0) %	Vodafone I	5	(2.7) %	(69.6) %
DLF	166	4.0 %	(15.1) %	Indiabulls	442	(1.6) %	(47.8) %
Titan Comp	1,123	3.4 %	0.3 %	Bharti Air	343	(1.3) %	9.6 %

### 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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