



16 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,513	0.0 %	2.9 %
BSE SENSEX	34,865	0.4 %	5.2 %
CNX BANK	25,388	0.0 %	4.4 %
CNX MIDCAP	16,902	0.0 %	(11.5) %
CNX SMALLCAP	6,111	0.0 %	(22.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,251	(0.4) %	1.7 %
S&P 500	2,751	(0.6) %	2.0 %
FTSE 100	7,029	0.5 %	(8.1) %
HANG SENG	25,445	(1.4) %	(16.6) %
NIKKEI	22,271	(1.9) %	(5.3) %
SHANGHAI COMPOSITE	2,568	(1.5) %	(23.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.82	(0.4) %	15.9 %
EUR/USD	1.16	(0.1) %	(3.5) %
GBP/USD	1.32	(0.6) %	(2.7) %
USD/JPY	111.97	(0.3) %	(0.7) %
USD/AUD	1.40	(0.3) %	9.6 %
USD/SGD	1.38	0.1 %	3.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	(11.1) %	18.2 %
Gold(INR/10g)	31,892	1.0 %	8.6 %
Gold Comex(USD/oz)	1,221	(0.3) %	(6.7) %
SILVER(INR/1Kg)	38,634	1.0 %	0.1 %
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 US Commerce Department said retail sales edged up by 0.1% in September, matching the uptick seen in August. The New York Fed said its general business conditions index rose to 21.1 in October from 19.0 in September, with a positive reading indicating growth in regional manufacturing activity. German manufacturers added more employees during August compared to a year ago, preliminary figures the Federal Statistical Office showed on Monday. The number of employees in the manufacturing units with 50 or more persons grew by about 149,000 persons or 2.7% from the same period last year to 5.7 million. China central bank governor Yi Gang has reportedly stated that there is still plenty of room for adjustment in interest rates and the reserve requirement ratio (RRR), as downside risks from trade tensions with the United States remain significant. Japan's final industrial production was downwardly revised by 0.2% on an annual basis in August, compare to a rise of 2.2% in the prior month. The preliminary figures had recorded a climb of 0.6%.

Global Equities: Stocks started on a tepid note on worries over rising US interest rates, Brexit uncertainty, global growth concerns and the Italy budget row. A growing feud between the US and Saudi Arabia over the disappearance of a prominent Saudi journalist also weighed on the general mood.

Indian Economy: India's trade deficit contracted to a five-month low of \$13.98 billion for the month of September compared to \$17.39 billion in August. The exports for the month of September dropped by 2.2% while the imports rose by 10.5%. For the six-month period between April and September, the trade deficit came in at \$94.32 billion with exports up by 12.5% and imports witnessing a rise of 16.2%. India's wholesale price index rose 5.13% year-on-year in September after a 4.53% increase in August. On a month-on-month basis, the wholesale prices grew 0.7% in September. Primary articles group registered 0.2% price growth, though food prices dropped 0.2%. Non-food prices also decreased 0.2%.

Equity Markets: Local stocks stayed supported after the recent battering. Trading for the week started on a positive note as key equity indices finished higher in a volatile trade on Monday. Pharmaceuticals and IT shares advanced while metals and auto sector shares witnessed selling. Indices were choppy in intraday as rising oil prices and a weakening rupee spooked investors during the earnings season, amid negative Asian cues.

Corporate News: IndusInd Bank reported 4.6% year-on-year growth in second quarter profit to Rs 920.25 crore. The bank said excluding one-off prudential contingent provision, profit increased 25% YoY. Net interest income grew by 21% year-on-year to Rs 2,203.28 crore in Q2 with robust loan growth at 32.4% and deposit growth at 19% YoY. However, the net interest margin declined to 3.88% in September 2018 against 4% last year. Indiabulls Housing Finance stated that its consolidated net sales were Rs 3,980.39 crore in September 2018, up 29.78% on year. Quarterly Net Profit came in at Rs. 1,044.15 crore in September 2018, up 21.26% while the EBITDA stood at Rs 3,668.05 crore in September 2018, up 37.2%. Glenmark Pharmaceuticals has been granted final approval by the United States Food & Drug Administration (U.S. FDA) for Hydrocortisone Valerate Cream USP, 0.2%, a generic version of Westcort 1 Cream, 0.2%, of Sun Pharmaceutical Industries Inc. The Board of Gujarat Gas will meet on 03 November 2018 to consider sub-division of equity shares of Rs. 10/- each of the Company. Infibeam Avenues has executed an agreement with Sintex BAPL, wholly owned subsidiary of Sintex Plastics Technology. As per the Agreement signed, Infibeam will develop, integrate, implement and maintain an online ecommerce and mobile platform with integrated logistics framework.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(150.2)	(261.5)	(49.1)
MF(INR cr)	1,354.4	1,235.5	455.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,773	40,080	35,319
F&O(INR cr)	692,766	1,077,071	964,295

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.3	17.1	14.3
NSE VIX	18.9	19.0	13.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,388	(0.0) %	4.4 %	Energy	14,363	0.8 %	8.1 %
IT	14,797	1.8 %	16.4 %	Pharma	9,774	2.6 %	13.4 %
Metals	3,424	(0.4) %	(3.3) %	Finance	10,545	0.1 %	2.8 %
Auto	9,035	(0.5) %	(18.3) %	PSU	2,707	0.1 %	(5.2) %
FMCG	28,331	0.6 %	6.9 %	Real Estate	210	0.1 %	(29.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Motherson	251	5.1 %	(22.4) %	Avenue Sup	1,330	(5.8) %	(2.0) %
Lupin	887	4.8 %	14.1 %	Bajaj Fins	5,634	(3.1) %	7.0 %
Dr Reddy's	2,567	4.7 %	20.4 %	Dabur Indi	396	(2.8) %	18.0 %
Cipla	648	4.0 %	12.4 %	Hind. Unil	1,526	(2.8) %	13.0 %
LIC Housin	447	3.7 %	(17.1) %	H P C L	213	(2.7) %	(38.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Inflation Expectation (AUG)	16-10-2018	01:00	AUD	-	0.039
Employment Change (JUL)	16-10-2018	01:30	AUD	-	-
Full Time Employment Change (JUL)	16-10-2018	01:30	AUD	-	-
Part Time Employment Change (JUL)	16-10-2018	01:30	AUD	-	-
Participation Rate (JUL)	16-10-2018	01:30	AUD	-	0.657
RBA Foreign Exchange Transaction (Australian dollar) (JUL)	16-10-2018	01:30	AUD	-	-
RBA FX Transactions Government (JUL)	16-10-2018	01:30	AUD	-	-
RBA FX Transactions Other (JUL)	16-10-2018	01:30	AUD	-	-
Unemployment Rate (JUL)	16-10-2018	01:30	AUD	-	0.054
RBA's Ellis Speech in Canberra	16-10-2018	07:30	AUD	-	-
RBA Governor Semiannual Testimony	16-10-2018	23:30	AUD	-	-
ADP Publishes July Payrolls Report	16-10-2018	12:30	CAD	-	-
Manufacturing Sales (MoM) (JUN)	16-10-2018	12:30	CAD	-	0.014
German Wholesale Price Index (MoM) (JUL)	16-10-2018	06:00	EUR	-	0.005
German Wholesale Price Index (YoY) (JUL)	16-10-2018	06:00	EUR	-	0.034
Euro-Zone Trade Balance (euros) (JUN)	16-10-2018	09:00	EUR	-	-
Euro-Zone Trade Balance s.a. (JUN)	16-10-2018	09:00	EUR	-	-
Retail Sales Ex Auto Fuel (MoM) (JUL)	16-10-2018	08:30	GBP	-	(0.006)
Retail Sales Ex Auto Fuel (YoY) (JUL)	16-10-2018	08:30	GBP	-	0.03
Retail Sales Inc Auto Fuel (MoM) (JUL)	16-10-2018	08:30	GBP	-	(0.005)
Retail Sales Inc Auto Fuel (YoY) (JUL)	16-10-2018	08:30	GBP	-	0.029
Non Resident Bond Holdings (JUL)	16-10-2018	03:00	NZD	-	0.581
Producer Price Index Input (QoQ) (2Q)	16-10-2018	22:45	NZD	-	0.006
Producer Price Index Output (QoQ) (2Q)	16-10-2018	22:45	NZD	-	0.002
Building Permits (JUL)	16-10-2018	12:30	USD	-	-
Building Permits (MoM) (JUL)	16-10-2018	12:30	USD	-	(0.022)
Continuing Claims (AUG 4)	16-10-2018	12:30	USD	-	-
Housing Starts (JUL)	16-10-2018	12:30	USD	-	-
Housing Starts (MoM) (JUL)	16-10-2018	12:30	USD	-	(0.122)



Initial Jobless Claims (AUG 11)	16-10-2018	12:30	USD	-	-
Philadelphia Fed Business Outlook (AUG)	16-10-2018	12:30	USD	-	25.7
EIA Natural Gas Storage Change (AUG 10)	16-10-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (AUG 10)	16-10-2018	14:30	USD	-	-

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