



16 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,471	0.4 %	(1.7) %
BSE SENSEX	38,506	0.8 %	(0.7) %
CNX BANK	28,555	0.0 %	(5.8) %
CNX MIDCAP	15,629	0.0 %	(14.7) %
CNX SMALLCAP	5,408	0.0 %	(19.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,025	0.9 %	15.8 %
S&P 500	2,996	1.0 %	19.5 %
FTSE 100	7,212	(0.0) %	7.1 %
HANG SENG	26,522	0.8 %	5.5 %
NIKKEI	22,207	1.9 %	13.5 %
SHANGHAI COMPOSITE	2,991	(0.6) %	21.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.86	0.2 %	2.1 %
EUR/USD	1.10	(0.0) %	(3.7) %
GBP/USD	1.26	0.2 %	(1.3) %
USD/JPY	108.33	0.1 %	(1.2) %
USD/AUD	1.48	0.3 %	3.9 %
USD/SGD	1.37	(0.3) %	0.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	1.5 %	17.5 %
Gold(INR/10g)	38,534	0.4 %	22.2 %
Gold Comex(USD/oz)	1,499	0.3 %	16.1 %
SILVER(INR/1Kg)	45,798	0.8 %	19.7 %
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: International Monetary Fund (IMF) cut the growth forecast for this year to 3% from 3.3% projected in April, in its latest World Economic Outlook yesterday. This will be the lowest since 2008-09 global financial crisis. The projection for 2020 was lowered to 3.4% from 3.6% forecast in April. The New York Fed said its headline general business conditions index edged up to 4.0 in October after dipping to 2.0 in September, China consumer price inflation accelerated to the highest since 2013 on food prices. Consumer prices in China were up 3% on year in September. This was up from 2.8% in August. On a monthly basis, inflation rose 0.9%, accelerating from 0.7% in the previous month. Core inflation excluding food and energy remained stable at 1.5%. China's producer prices decreased 1.2% annually after falling 0.8% in August. Chinese banks extended 1.69 trillion yuan in new loans in September, up impressively from 1.21 trillion yuan the previous month but largely in line with the tally in September last year. German ZEW Indicator of Economic Sentiment for Germany dropped to -22.8 from -22.5 in September. The reading remains below its long-term average of 21.4. Japan's industrial production declined in August as initially estimated. Industrial production dropped 1.2% month-on-month in August, reversing a 1.3% rise in July.

Global Equities: US stocks jumped on upbeat earnings as DOW soared around 1%.

Indian Economy: India is one of the major drivers of global economic and oil demand growth. The country's GDP is projected to grow by 6.1% in 2019 and 6.7% in 2020, making it one of the world's fastest growing economies, noted Mohammad Sanusi Barkindo, OPEC Secretary General at the 3rd India Energy Forum by CERAWEEK. He stated further that India's oil demand increased in August by 0.12 mb/d for the second month running with total consumption of 4.61 mb/d. The country's oil demand growth in 2019 is estimated at 0.14 mb/d y-o-y, accounting for 15% of global oil demand growth. Consumer price inflation was up by 3.99% in September (2019) from last year's level of 3.70% and month before level of 3.28%. This is the highest CPI figure since July 2018. The spike, up from the Aug'19 numbers of 3.28%, is driven by higher food prices. The jump in food and beverages inflation in Rural and Urban areas is primarily driven by jump in vegetable and protein components, noted the State Bank Of India (SBI), in Ecowrap. India's vegetable oil imports fell by 13% to 13.03 lakh tonnes in September from same month last year, industry body SEA said.

Equity Markets: Key benchmark indices ended with strong gains on Tuesday, tracking positive global sentiments triggered by China confirming phase-one trade deal with the US. Geng Shuang, spokesman of China's Foreign Ministry, reportedly said US statement on partial trade deal is accurate and there is no difference with the US on the trade agreement.

Corporate News: IT major Wipro's consolidated net profit rose 6.91% to Rs 2552.70 crore on a 1.98% rise in total income to Rs 15875.40 crore in Q2 September 2019 compared with Q1 June 2019. ACC's consolidated net profit rose 44.68% to Rs 302.53 crore on a 3.28% rise in total income to Rs 3582.16 crore in Q3 September 2019 compared with Q3 September 2018. Federal Bank's net profit rose 46.25% to Rs 384.21 crore on a 23.23% rise in total income to Rs 3620.82 crore in Q2 September 2019 compared with Q2 September 2018. Multi Commodity Exchange of India's consolidated net profit rose 99.69% to Rs 71.75 crore on a 54.96% rise in total income to Rs 144.53 crore in Q2 September 2019 compared with Q2 September 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	866.4	16.3	11.1
MF(INR cr)	395.6	408.2	412.2

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	39,515	34,653	35,319
F&O(INR cr)	930,743	1,482,359	1,337,431

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.7	15.7
NSE VIX	16.9	17.3	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	28,555	1.3 %	(5.8) %	Energy	15,783	1.1 %	(4.5) %
IT	15,208	(0.5) %	(4.0) %	Pharma	7,421	0.8 %	(20.8) %
Metals	2,397	1.6 %	(22.7) %	Finance	12,905	0.9 %	3.2 %
Auto	7,688	2.2 %	(8.6) %	PSU	2,167	0.4 %	(36.0) %
FMCG	30,928	1.1 %	2.4 %	Real Estate	254	0.7 %	(5.1) %

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>
Bandhan Ba	624	9.7 %	17.7 %	Indiabulls	189	(4.4) %	(77.7) %
Eicher Mot	19,199	4.8 %	(4.2) %	Vodafone I	6	(3.9) %	(65.4) %
Vedanta	154	3.9 %	(18.7) %	P & G Hygi	11,329	(3.7) %	5.0 %
Bosch	13,853	3.8 %	(23.5) %	Bharti Air	384	(2.5) %	22.6 %
General In	217	3.4 %	(11.8) %	Infosys	768	(2.3) %	1.7 %

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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