



17 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,663	0.0 %	(0.1) %
BSE SENSEX	39,131	0.6 %	0.7 %
CNX BANK	30,571	0.0 %	0.8 %
CNX MIDCAP	17,137	0.0 %	(6.5) %
CNX SMALLCAP	6,039	0.0 %	(10.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,336	(0.1) %	17.2 %
S&P 500	3,004	(0.3) %	19.8 %
FTSE 100	7,577	0.6 %	12.5 %
HANG SENG	28,620	0.2 %	13.9 %
NIKKEI	21,535	(0.7) %	10.1 %
SHANGHAI COMPOSITE	2,938	(0.2) %	19.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.38	0.2 %	(1.5) %
EUR/USD	1.13	0.0 %	(1.6) %
GBP/USD	1.25	0.1 %	(1.6) %
USD/JPY	107.93	(0.3) %	(1.6) %
USD/AUD	1.42	(0.8) %	0.1 %
USD/SGD	1.36	0.0 %	(0.6) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(2.9) %	24.3 %
Gold(INR/10g)	34,583	0.1 %	9.7 %
Gold Comex(USD/oz)	1,407	(0.6) %	9.0 %
SILVER(INR/1Kg)	38,376	0.7 %	0.3 %
Aluminium(USD/MT)	1,818	0.4 %	(2.2) %
Copper(USD/MT)	5,959	(0.6) %	2.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	0.0 %	(0.5) %

Global Economy: The Commerce Department said July 16 that retail sales rose 0.4% last month, the fourth straight increase. The US business inventories rose by 0.3% in May after climbing by 0.5% in April. The NAHB/Wells Fargo Index rose to 65 in July after dropping to 64 in June. The Fed said industrial production was unchanged in June after climbing by 0.4% in May. Eurozone's trade surplus rose in May, led by a rebound in exports, while imports decreased, preliminary data from Eurostat showed on Tuesday. The seasonally adjusted trade surplus rose to EUR 20.2 billion from EUR 15.7 billion in April. Exports grew 1.4% month-on-month, while imports fell 1%. Germany's economic confidence weakened to a nine-month low in July, survey data from the ZEW-Leibniz Centre for European Economic Research showed on Tuesday. The economic confidence index declined to -24.5 in July from -21.1 in June. The UK unemployment rate remained unchanged at 44-year low in three months to May and wages grew at the fastest pace in 11 years, data from the Office for National Statistics showed. The unemployment rate remained unchanged at 3.8 percent in three months to May, The Reserve Bank of Australia said policymakers will continue monitoring the labor market closely and expressed willingness to adjust policy further if required. According to the minutes of the meeting held on July 2, the board observed that the lower interest rates would provide more Australians with jobs and helps in achieving the inflation target.

Global Equities: Sentiments remained steady as investors focused on the earnings. Dow hit another record high in intraday moves.

Indian Economy: The Federation of Automobile Dealers Associations (FADA) noted in its Monthly Vehicle Registration Data for the Month of June 2019 that Q1FY20 ended on a negative note as Total Vehicle Registrations for the quarter decreased by -6% YoY. Commercial Vehicles or CV segment leads the de-growth at-14% followed by 2W at -6.4% and 3W at-6.1%, says FADA. Passenger Vehicles or PV dropped the least at -1%. For the month of June, sales were negative both YoY and MoM with MoM drop seen higher with delay in monsoon and continued liquidity tightness affecting consumer sentiment and on YoY basis, Total Vehicle Registrations fell -5.4%, with CV falling -19.3%, 2W -5%, PV -4.6% and 3W 2.8%. India's exports have entered negative zone after a gap of eight months recording a decline of 9.71% \$25.01 billion in June, according to the government data. Imports also declined 9% to \$40.29 billion in June mainly due to falling prices of petroleum products, leaving a trade deficit of \$15.28 billion. It was \$16.6 billion in June 2018.

Equity Markets: Key equity benchmarks ended higher on Tuesday, supported by gains in major index linked counters. The Sensex closed above 39,000 level while the Nifty ended below 11,600 mark after crossing that level in intraday trade. The barometer index, the S&P BSE Sensex, rose 234.33 points or 0.60% to 39,131.04. The Nifty 50 index rose 74.25 points or 0.64% to 11,588.

Corporate News: TCS announced that its TCS BaNCS" Network Solution powered by Quartz" Blockchain was named the Best Blockchain Breakthrough of the year at the 2019 FTF News Technology Innovation Awards. KNR Construction stated that it received a work order for Rs. 847.34 Crores from Navayuga Engineering Company Limited. Wipro and Yes Bank will declare their Q1 results today, 17 July 2019. DCB Bank's net profit rose 16.63% to Rs 81.06 crore on 20.43% rise in total income to Rs 944.46 crore in Q1 June 2019 over Q1 June 2018. The result was announced after market hours yesterday, 16 July 2019.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(27.7)	(70.0)	52.4
MF(INR cr)	536.8	134.9	116.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,317	30,921	33,851
F&O(INR cr)	874,279	1,124,305	1,214,129

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	13.1	14.9
NSE VIX	11.6	13.2	18.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,571	0.4 %	0.8 %	Energy	15,650	1.5 %	(5.3) %
IT	15,580	(0.5) %	(1.6) %	Pharma	8,348	1.4 %	(11.0) %
Metals	2,847	0.9 %	(8.2) %	Finance	13,423	0.4 %	7.4 %
Auto	7,727	0.7 %	(8.2) %	PSU	3,142	1.5 %	(7.2) %
FMCG	29,367	1.0 %	(2.7) %	Real Estate	286	1.9 %	6.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	104	11.4 %	(62.4) %	Piramal En	2,037	(2.0) %	(24.4) %
Tata Motor	170	5.6 %	(9.3) %	TCS	2,106	(1.9) %	3.7 %
Interglobe	1,445	4.6 %	2.0 %	M & M	623	(1.4) %	(5.7) %
Tata Motor	81	3.9 %	(12.4) %	Motherson	117	(1.1) %	(23.7) %
Dabur Indi	425	3.5 %	6.0 %	ICICI Lomb	1,066	(1.0) %	5.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (JUN)	17-07-2019	0:30	AUD	-	(0.001)
Consumer Price Index (JUN)	17-07-2019	12:30	CAD	-	136.6
Consumer Price Index (YoY) (JUN)	17-07-2019	12:30	CAD	-	0.024
Consumer Price Index Core (YoY) (JUN)	17-07-2019	12:30	CAD	-	0.018
Consumer Price Index n.s.a. (MoM) (JUN)	17-07-2019	12:30	CAD	-	0.004
CPI Core - Median (YoY) (JUN)	17-07-2019	12:30	CAD	-	0.021
CPI Core - Trim (YoY) (JUN)	17-07-2019	12:30	CAD	-	0.023
Manufacturing Sales (MoM) (MAY)	17-07-2019	12:30	CAD	-	(0.006)
EU 25 New Car Registrations (JUN)	17-07-2019	6:00	EUR	-	0.001
Euro-Zone Construction Output s.a. (MoM) (MAY)	17-07-2019	9:00	EUR	-	(0.008)
Euro-Zone Construction Output w.d.a. (YoY) (MAY)	17-07-2019	9:00	EUR	-	0.039
Euro-Zone Consumer Price Index (MoM) (JUN)	17-07-2019	9:00	EUR	-	0.001
Euro-Zone Consumer Price Index (YoY) (JUN F)	17-07-2019	9:00	EUR	-	0.012
Euro-Zone Consumer Price Index Core (YoY) (JUN F)	17-07-2019	9:00	EUR	-	0.011
Consumer Price Index (MoM) (JUN)	17-07-2019	8:30	GBP	-	0.003
Consumer Price Index (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.02
Core Consumer Price Index (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.017
CPIH (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.019
House Price Index (YoY) (MAY)	17-07-2019	8:30	GBP	-	0.014
Producer Price Index Input n.s.a. (MoM) (JUN)	17-07-2019	8:30	GBP	-	0
Producer Price Index Input n.s.a. (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.013
Producer Price Index Output Core n.s.a. (MoM) (JUN)	17-07-2019	8:30	GBP	-	0.001
Producer Price Index Output Core n.s.a. (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.02
Producer Price Index Output n.s.a. (MoM) (JUN)	17-07-2019	8:30	GBP	-	0.003
Producer Price Index Output n.s.a. (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.018
Retail Price Index (JUN)	17-07-2019	8:30	GBP	-	289.2
Retail Price Index (MoM) (JUN)	17-07-2019	8:30	GBP	-	0.003
Retail Price Index (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.03
Retail Price Index Excl. Food & Alcohol (YoY) (JUN)	17-07-2019	8:30	GBP	-	0.02



Adjusted Merchandise Trade Balance (Yen) (JUN)	17-07-2019	23:50	JPY	-	-
Exports (YoY) (JUN)	17-07-2019	23:50	JPY	-	(0.078)
Imports (YoY) (JUN)	17-07-2019	23:50	JPY	-	(0.015)
Trade Balance (JUN)	17-07-2019	23:50	JPY	-	-
MBA Mortgage Applications (JUL 12)	17-07-2019	11:00	USD	-	(0.024)
Building Permits (JUN)	17-07-2019	12:30	USD	-	-
Building Permits (MoM) (JUN)	17-07-2019	12:30	USD	-	0.003
Housing Starts (JUN)	17-07-2019	12:30	USD	-	-
Housing Starts (MoM) (JUN)	17-07-2019	12:30	USD	-	(0.009)
DOE Cushing OK Crude Inventory (JUL 12)	17-07-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUL 12)	17-07-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUL 12)	17-07-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 12)	17-07-2019	14:30	USD	-	-
U.S. Federal Reserve Releases Beige Book	17-07-2019	18:00	USD	-	-

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