



17 Aug.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,445	0.5 %	12.1 %
BSE SENSEX	37,664	(0.5) %	14.1 %
CNX BANK	27,990	0.6 %	15.1 %
CNX MIDCAP	19,369	0.8 %	1.4 %
CNX SMALLCAP	7,506	0.8 %	(5.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,559	1.6 %	3.0 %
S&P 500	2,841	0.8 %	5.4 %
FTSE 100	7,556	0.8 %	(1.2) %
HANG SENG	27,100	(0.8) %	(11.2) %
NIKKEI	22,192	(0.1) %	(5.6) %
SHANGHAI COMPOSITE	2,705	(0.7) %	(19.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.16	0.3 %	10.2 %
EUR/USD	1.14	(0.3) %	(5.2) %
GBP/USD	1.27	(0.4) %	(5.9) %
USD/JPY	110.85	0.0 %	(1.7) %
USD/AUD	1.38	0.1 %	7.6 %
USD/SGD	1.38	0.0 %	3.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	0.7 %	8.4 %
Gold(INR/10g)	29,361	(0.6) %	0.0 %
Gold Comex(USD/oz)	1,184	0.4 %	(9.6) %
SILVER(INR/1Kg)	36,660	(2.2) %	(5.0) %
Aluminium(USD/MT)	1,998	0.2 %	(11.4) %
Copper(USD/MT)	5,860	0.3 %	(18.4) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** The Commerce Department said housing starts rose by 0.9% to an annual rate of 1.168 million in July after plummeting by 12.9% to a revised rate of 1.158 million in June. A report released by the Labor Department on Thursday showed first-time claims for US unemployment benefits unexpectedly edged lower in the week ended August 11th. The report said initial jobless claims dipped to 212,000, a decrease of 2,000 from the previous week's revised level of 214,000. Euro area seasonally adjusted trade surplus fell to EUR 16.7 billion in June from EUR 16.9 billion in May, preliminary data from Eurostat showed Thursday. Exports rose 1.6% month-on-month and imports grew 1.8%. On a non-seasonally adjusted basis, the trade surplus decreased to EUR 22.5 billion from EUR 25.7 billion in the same month last year. Compared to a year ago, exports grew 5.7% and imports rose 8.6%. Japan recorded a merchandise trade deficit of 231.2 billion yen in July, the Ministry of Finance said. The ministry also downwardly revised its June deficit slightly to 720.8 billion yen from 721.4 billion yen). The Japanese exports were up 3.9% on year to 6.747 trillion yen while imports soared by an annual 14.6% to 6.978 trillion yen following the upwardly revised 2.6% gain a month earlier.

**Global Equities:** DOW soared on reports that China has accepted an invitation from the US for a new round of trade talks to be held in late August.

**Indian Economy:** Inflationary headwinds have prompted India Ratings to lower the growth projection for the current fiscal (2018-19) to 7.2%. At the same time, the rating and research agency apprehends that populism on account of forthcoming election might upset the fiscal maths in the States. The agency in its report, released on Thursday, has listed many reasons for the headwinds. These include elevated global crude oil prices, Government's decision to fix the minimum support price of all kharif crops at 1.5 times of the production cost, rising trade protectionism, depreciating rupee and no visible signs of the abatement of the non-performing assets of the banking sector. Following this, the agency has lowered its growth projection by 20 bps from the earlier projection of 7.4%.

**Equity Markets:** Local stocks registered modest losses on selling pressure in index pivots led by HDFC, Kotak Mahindra Bank and Reliance Industries. The barometer index, the S&P BSE Sensex, lost 188.44 points or 0.50% to settle at 37,663.56. The Nifty 50 index lost 50.05 points or 0.44% to settle at 11,385.05. Metal and mining stocks declined. Intraday volatility was high. Indices remained in negative zone for most part of the day's trading session.

**Corporate News:** Kotak Mahindra Bank plans to open over 100 branches to take the network to 1,500 from the existing 1,391 by the end of the current fiscal, according to media reports. IT stocks would be under continued watch. The Indian rupee fell to an all-time low of 70.40 against the dollar as sentiment weakened after the US dollar continued to strengthen against its Asian peers. Domestic Urea production is likely to increase 1.6% to 24.4 million tonne (MT) in 2018-19 financial year on smooth functioning of units, sources with Fertiliser Ministry said, according to media reports.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(53.2)	22.0	(24.6)
MF(INR cr)	14.8	31.0	397.2

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	37,297	35,864	33,352
F&O(INR cr)	749,496	925,375	876,200

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.6	12.4	14.5
NSE VIX	13.7	12.8	13.2

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,827	(0.7) %	14.4 %	Energy	15,239	(0.5) %	14.7 %
IT	15,044	0.2 %	18.4 %	Pharma	9,595	1.2 %	11.3 %
Metals	3,337	(2.3) %	(5.7) %	Finance	11,536	(1.1) %	12.4 %
Auto	10,831	0.3 %	(2.1) %	PSU	3,127	(0.8) %	9.6 %
FMCG	31,731	0.0 %	19.7 %	Real Estate	274	(0.5) %	(7.7) %

### 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>
GAIL (Indi)	394	3.7 %	21.2 %	Piramal En	2,711	(4.3) %	9.7 %
Dr Reddy's	2,353	3.3 %	10.4 %	Emami	551	(3.9) %	0.9 %
Godrej Con	1,335	3.1 %	19.7 %	S A I L	74	(3.8) %	1.9 %
Sun Pharma	620	3.0 %	22.0 %	JSW Steel	328	(3.8) %	10.7 %
Punjab Nat	82	2.1 %	(15.3) %	Kotak Mah.	1,245	(3.7) %	13.6 %

### 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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