



17 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,465	(0.4) %	12.3 %
BSE SENSEX	38,091	1.0 %	13.7 %
CNX BANK	27,003	(0.6) %	11.0 %
CNX MIDCAP	19,316	(0.4) %	1.1 %
CNX SMALLCAP	7,375	(0.2) %	(7.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,155	0.0 %	5.4 %
S&P 500	2,905	0.0 %	7.8 %
FTSE 100	7,304	0.3 %	(4.5) %
HANG SENG	27,286	1.0 %	(10.6) %
NIKKEI	23,095	1.2 %	(1.8) %
SHANGHAI COMPOSITE	2,682	(0.2) %	(19.9) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.86	(0.5) %	12.9 %
EUR/USD	1.16	(0.1) %	(3.2) %
GBP/USD	1.31	0.2 %	(3.3) %
USD/JPY	112.06	0.6 %	(0.6) %
USD/AUD	1.40	0.5 %	9.3 %
USD/SGD	1.37	0.2 %	2.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.6 %	14.3 %
Gold(INR/10g)	30,558	0.3 %	4.1 %
Gold Comex(USD/oz)	1,199	(1.0) %	(8.4) %
SILVER(INR/1Kg)	36,565	0.0 %	(5.3) %
Aluminium(USD/MT)	2,016	0.0 %	(10.7) %
Copper(USD/MT)	5,947	(0.7) %	(17.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

**Global Economy:** The Consumer sentiment in the US improved by much more than anticipated in the month of September. According to a report released by the University of Michigan on Friday, the consumer sentiment index soared to 100.8 in September from 96.2 in August. A report released by the Federal Reserve on Friday showed US industrial production rose by slightly more than expected. The Fed said industrial production climbed by 0.4% in August, matching the upwardly revised increase in July. Eurozone trade surplus fell to a seasonally adjusted EUR 12.76 billion from EUR 16.47 billion in June, figures from Eurostat showed. This was the lowest since June 2014. On a yearly basis, exports advanced 9.4% and imports increased 13.4% in July. China industrial production climbed 6.1% year-on-year in August, slightly faster than the 6% increase seen in July, data from the National Bureau of Statistics revealed. Retail sales growth improved to 9% in August from 8.8% in July. Further data showed that during the January to August period, fixed asset investment rose at a slower pace of 5.3% from the previous year compared to 5.5% in the January to July period.

**Global Equities:** Markets are likely to be on tenterhooks on continued global trade jitters. US President Donald Trump is likely to proceed with tariffs on \$200 billion more on Chinese goods.

**Indian Economy:** Merchandise exports in August 2018 were US \$ 27.84 Billion, as compared to US \$23.36 Billion in August 2017, exhibiting a positive growth of 19.21%. In Rupee terms, exports were Rs 1,93,624.74 Crore in August 2018, as compared to Rs. 1,49,398.90 Crore in August 2017, registering a positive growth of 29.60%. Imports in August 2018 were US \$ 45.24 Billion (Rs 3,14,597.54 Crore), which was 25.41% higher in Dollar terms and 36.34% higher in Rupee terms over imports of US \$ 36.07 Billion (Rs 2,30,737.96 Crore) in August 2017. The trade deficit for August 2018 was estimated at US \$ 17.39 Billion as against the deficit of US\$ 12.72 Billion in August 2017. Taking merchandise and services together, overall trade deficit for April-August 2018-19 is estimated at US \$ 47.72 Billion as compared to US \$ 38.95 Billion in April-August 2017-18.

**Equity Markets:** Local stocks could see a mixed movement after carving out a recovery from six week lows. The government has decided to curb non-essential imports and increase exports, besides announcing five-pronged measures to increase dollar inflows into the country to fund and reduce the current account deficit (CAD).

**Corporate News:** Wipro and Mercury Network, now a part of CoreLogic, announced an agreement to jointly offer appraisal management platform systems to customers in the financial services space. These include banks, mortgage/lending companies, credit unions, underwriting and appraisal management companies. Infrastructure stocks would be in focus. Mandatory hedging conditions for infrastructure loans through the external commercial borrowing (ECB) route will be reviewed and a 20% exposure limit on investments by foreign portfolio investors in debt to a single corporate group will be removed. Government will also permit the manufacturing sector to access ECBs up to \$50 million with residual maturity of one year instead of three years. Metal counters could be under pressure as weak Chinese data is denting global Copper futures.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(148.0)	(23.5)	(26.7)
MF(INR cr)	925.9	406.0	367.9

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,499	38,598	34,161
F&O(INR cr)	612,454	1,198,462	916,986

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.1	13.5	14.2
NSE VIX	13.8	14.1	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	27,164	1.3 %	11.7 %	Energy	15,792	1.2 %	18.8 %
IT	16,073	0.1 %	26.5 %	Pharma	10,653	2.5 %	23.6 %
Metals	3,714	2.3 %	4.9 %	Finance	11,415	1.8 %	11.2 %
Auto	10,827	1.3 %	(2.1) %	PSU	3,096	1.8 %	8.5 %
FMCG	30,988	0.5 %	16.9 %	Real Estate	266	3.5 %	(10.2) %

### 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>
Indiabulls	1,227	7.2 %	(1.3) %	Cummins In	755	(2.9) %	5.4 %
B P C L	355	6.1 %	(16.3) %	Coal India	277	(1.5) %	(0.1) %
Vedanta	236	5.4 %	(16.5) %	HCL Techno	1,071	(1.5) %	9.3 %
H P C L	253	5.1 %	(26.7) %	Infosys	734	(1.2) %	29.0 %
Shree Ceme	17,680	4.7 %	7.7 %	A B B	1,448	(1.0) %	12.0 %

### 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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