



17 Sep.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,004	0.0 %	(5.7) %
BSE SENSEX	37,123	(0.7) %	(4.2) %
CNX BANK	27,855	0.0 %	(8.1) %
CNX MIDCAP	15,943	0.0 %	(13.0) %
CNX SMALLCAP	5,619	0.0 %	(16.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,077	(0.5) %	16.1 %
S&P 500	2,998	(0.3) %	19.6 %
FTSE 100	7,321	(0.6) %	8.7 %
HANG SENG	27,125	(0.8) %	7.9 %
NIKKEI	21,988	1.1 %	12.4 %
SHANGHAI COMPOSITE	3,031	(0.0) %	22.9 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.90	(1.2) %	2.1 %
EUR/USD	1.11	0.3 %	(3.3) %
GBP/USD	1.25	1.2 %	(1.9) %
USD/JPY	108.10	0.7 %	(1.4) %
USD/AUD	1.45	(0.2) %	2.4 %
USD/SGD	1.37	(0.4) %	0.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	62	13.0 %	33.2 %
Gold(INR/10g)	37,780	0.5 %	19.8 %
Gold Comex(USD/oz)	1,508	0.8 %	16.8 %
SILVER(INR/1Kg)	45,859	(0.8) %	19.8 %
Aluminium(USD/MT)	1,771	0.1 %	(4.7) %
Copper(USD/MT)	5,877	0.1 %	0.7 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

**Global Economy:** The New York Fed said its general business conditions index dropped to 2.0 in September from 4.8 in August, although a positive reading still indicates an increase in regional manufacturing activity. China's industrial production growth fell to a 17 month low of 4.4% in August on year-on-year basis, latest data showed today. In other data, Chinese retail sales grew by 7.5% in August following the 7.6% increase in July. Fixed-asset investment for the first eight months of the year rose 5.5%, according to data published by the National Bureau of Statistics. The measure also continued to show moderation as fixed-asset investment had edged up by 5.7% year on year in the first seven months of 2019. World trade in commercial services lost momentum through the second quarter of 2019 according to the WTO's new Services Trade Barometer. The index's reading of 98.4 is below the baseline value of 100, suggesting that services trade continued to face strong headwinds leading into the second half of the year.

**Global Equities:** Global investors remained focused on the upcoming Fed meeting. Some geopolitical worries also lingered around. US President Donald Trump said that the United States was locked and loaded for a potential response to drone attack on Saudi Arabia's oil facilities.

**Indian Economy:** The Wholesale Price Index (WPI)-based inflation remained flat at 1.1% in August 2019, after moderating to a 25-month low of 1.1% in July 2019. Among the three major sub-groups, the inflation for primary articles increased snapping decline for last three months, while inflation for fuel and power and manufactured products groups have further declined contributing to the fall in overall WPI inflation in August 2019. The core inflation (manufactured products excluding foods products) slipped into sub-zero level after 33-months to (-) 0.5% in August 2019. Indian private and public sector banks (PSBs) had aggregate savings deposits of Rs 39.72 lakh crore as on March 31, 2019, while foreign banks had a share of Rs 58,630 crore, according to RBI data published in the latest Handbook of Statistics on Indian Economy.

**Equity Markets:** Key equity benchmarks declined on Monday, following a surge in global crude oil prices after attacks on Saudi Arabia's oil facilities. The barometer index, the S&P BSE Sensex, fell 261.68 points or 0.70% to 37,123.31. The Nifty 50 index fell 72.40 points or 0.65% to 11,003.50. Nifty opened below 11,000 mark and hit an intraday low of 10,968 in afternoon trade. Later the index trimmed losses and flirted with 11,000 mark and closed a tad above that level.

**Corporate News:** Tata Consultancy Services (TCS) and General Motors (GM) announced a new partnership in future global vehicle engineering. Wipro announced its strategic partnership with i4.0MC -Industrie 4.0 Maturity enter GmbH (i4.0MC), Germany, to drive digital transformation in manufacturing companies. Tata Power said its subsidiary Tata Power Renewable Energy Ltd (TPREL) has commissioned 150 mega watt (MW) solar capacity project at Pokharan in Rajasthan. With this, the overall operating renewable capacity of TPREL now stands at 2,628 MW in India.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(56.0)	(51.7)	(0.5)
MF(INR cr)	754.6	568.5	394.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,726	32,321	34,309
F&O(INR cr)	1,016,228	1,353,553	1,295,758

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.7	15.9	15.6
NSE VIX	15.0	16.0	17.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,855	(0.9) %	(8.1) %	Energy	14,533	(1.3) %	(12.1) %
IT	15,743	0.1 %	(0.6) %	Pharma	8,071	0.5 %	(13.9) %
Metals	2,441	(0.1) %	(21.3) %	Finance	12,398	(0.9) %	(0.8) %
Auto	7,301	(0.8) %	(13.2) %	PSU	2,480	(1.3) %	(26.7) %
FMCG	28,752	0.6 %	(4.8) %	Real Estate	266	(1.0) %	(0.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Colgate-Pa	1,315	4.9 %	4.5 %	B P C L	380	(7.0) %	(3.0) %
General In	185	4.4 %	(24.8) %	H P C L	256	(5.7) %	(9.9) %
Page Indus	19,352	3.9 %	(24.2) %	Vodafone I	5	(2.8) %	(70.4) %
Godrej Con	638	2.4 %	(5.7) %	Interglobe	1,672	(2.8) %	18.0 %
Titan Comp	1,149	2.2 %	2.5 %	M & M	537	(2.6) %	(18.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
House Price Index (QoQ) (2Q)	17-09-2019	1:30	AUD	-	(0.03)
House Price Index (YoY) (2Q)	17-09-2019	1:30	AUD	-	(0.074)
RBA Minutes of Sept. Policy Meeting	17-09-2019	1:30	AUD	-	-
Manufacturing Sales (MoM) (JUL)	17-09-2019	12:30	CAD	-	(0.012)
SECO September 2019 Economic Forecasts	17-09-2019	5:45	CHF	-	-
New Home Prices (MoM) (AUG)	17-09-2019	1:30	CNY	-	0.0059
ECB Chief Economist Lane Speaks in Luxembourg	17-09-2019	16:35	EUR	-	-
ECB Executive Board member Coeure Speaks in Luxembourg	17-09-2019	17:10	EUR	-	-
Euro-Zone ZEW Survey (Economic Sentiment) (SEP)	17-09-2019	9:00	EUR	-	(43.6)
German ZEW Survey Current Situation (SEP)	17-09-2019	9:00	EUR	-	(13.5)
German ZEW Survey Expectations (SEP)	17-09-2019	9:00	EUR	-	(44.1)
BOJ Outright Bond Purchase 1~3 Years	17-09-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	17-09-2019	1:10	JPY	-	-
Adjusted Merchandise Trade Balance (Yen) (AUG)	17-09-2019	23:50	JPY	-	-
Exports (YoY) (AUG)	17-09-2019	23:50	JPY	-	(0.016)
Imports (YoY) (AUG)	17-09-2019	23:50	JPY	-	(0.012)
Trade Balance (AUG)	17-09-2019	23:50	JPY	-	-
Tokyo Condominium Sales (YoY) (AUG)	17-09-2019	4:00	JPY	-	(0.353)
BoP Current Account Balance (2Q)	17-09-2019	22:45	NZD	-	-
Current Account Gross Domestic Product Ratio YTD (2Q)	17-09-2019	22:45	NZD	-	(0.036)
Non Resident Bond Holdings (AUG)	17-09-2019	3:00	NZD	-	0.536
Capacity Utilization (AUG)	17-09-2019	13:15	USD	-	0.775
Industrial Production (MoM) (AUG)	17-09-2019	13:15	USD	-	(0.002)
Manufacturing (SIC) Production (AUG)	17-09-2019	13:15	USD	-	(0.004)
NAHB Housing Market Index (SEP)	17-09-2019	14:00	USD	-	66
Net Long-term TIC Flows (JUL)	17-09-2019	20:00	USD	-	-
Total Net TIC Flows (JUL)	17-09-2019	20:00	USD	-	-

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