



17 Oct.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,585	0.0 %	3.7 %
BSE SENSEX	35,162	0.9 %	6.3 %
CNX BANK	25,590	0.0 %	5.2 %
CNX MIDCAP	17,164	0.0 %	(10.1) %
CNX SMALLCAP	6,234	0.0 %	(21.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,798	2.2 %	3.9 %
S&P 500	2,810	2.2 %	4.2 %
FTSE 100	7,059	0.4 %	(7.7) %
HANG SENG	25,462	0.1 %	(16.6) %
NIKKEI	22,549	1.3 %	(4.1) %
SHANGHAI COMPOSITE	2,546	(0.9) %	(24.0) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.47	(0.1) %	15.4 %
EUR/USD	1.16	0.1 %	(3.7) %
GBP/USD	1.32	0.2 %	(2.5) %
USD/JPY	112.36	0.1 %	(0.3) %
USD/AUD	1.40	(0.3) %	9.6 %
USD/SGD	1.37	(0.3) %	3.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	0.6 %	18.9 %
Gold(INR/10g)	31,799	(0.3) %	8.3 %
Gold Comex(USD/oz)	1,230	0.7 %	(6.1) %
SILVER(INR/1Kg)	38,589	(0.1) %	(0.0) %
Aluminium(USD/MT)	2,028	(0.8) %	(10.1) %
Copper(USD/MT)	6,296	(0.5) %	(12.3) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	(0.0) %	0.7 %

**Global Economy:** The US Federal Reserve said that industrial production rose by 0.3% in September after climbing by 0.4% in August. China's consumer inflation in September rose 2.5% compared to a year ago and 0.7% higher than August, government data showed. The Euro area trade surplus rose to a seasonally adjusted EUR 16.6 billion in August from EUR 12.6 billion in July, figures from Eurostat showed. Year-on-year, exports advanced 5.6% and imports climbed 8.4% in August. The UK unemployment rate remained at the lowest level seen since early 1975, in three months to August, the Office for National Statistics said. The ILO jobless rate came in at 4%, in line with expectations. Germany's economic sentiment index fell sharply by 14.1 points to -24.7 in October, survey data from the Centre for European Economic Research, or ZEW, showed. The indicator reached the same low-point as in July of this year, being at its lowest reading since August 2012. The assessment of the current economic also dropped 5.9 points to 70.1.

**Global Equities:** DOW soared on good corporate earnings despite escalating tensions between Saudi Arabia and the West exacerbating geopolitical concerns.

**Indian Economy:** The Government is preparing a roadmap to promote manufacturing of aeroplanes in India to ensure growth of country's aviation sector, union minister, Suresh Prabhu said. The growth in aviation would need at least 1,000 aeroplanes to be brought by India, but if we just continue to buy it, over a period of time we will result into becoming the largest importer of Aeroplanes, he noted. India's imports of Petroleum, Crude & products stood at Rs 78811.17 crore in September 2018, recording a surge of nearly 50% over year. Gold imports were at Rs 18731 crore, up nearly 70% over year while Silver imports edged up 4.13% to Rs 2133 crore. Import of Pulses stood at Rs 834.70 crore, down around 51%. The Gems & Jewellery exports stood at Rs 27080 crore, dropping 12.20% over year.

**Equity Markets:** Key equity benchmarks rose for third day in a row as investors shifted their focus to September quarter earnings season. A fall crude oil prices and an appreciation of rupee against the dollar also boosted sentiment. The Sensex ended above the psychologically important 35,000 mark. The Sensex rose 297.38 points or 0.85% to settle at 35,162.48, its highest closing level since 4 October 2018.

**Corporate News:** IT major Infosys said that on a consolidated basis, net profit rose 13.8% to Rs 4110 crore on 7.7% increase in revenues to Rs 20609 crore in Q2 September 2018 over Q1 June 2018. The Board of Cochin Shipyard has approved the proposal for buyback of equity shares of the Company of Rs 10 each not exceeding 43,95,610 equity shares at a price of Rs 455 per share for an aggregate not exceeding Rs 200 crore. L&T Technology Services has completed the acquisition of Bengaluru-based Graphene Semiconductor Services, a provider of end to end semiconductor services on 15 October 2018. Net profit of Hero MotoCorp declined 3.39% to Rs 976.28 crore on 8.59% rise in net sales to Rs 9090.94 crore in Q2 September 2018 over Q2 September 2017. Index heavyweight Reliance Industries will announce Q2 results today, 17 October 2018.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(0.1)	(235.3)	(48.7)
MF(INR cr)	935.9	1,202.2	458.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,286	39,463	35,304
F&O(INR cr)	807,280	1,052,545	963,141

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	21.3	17.5	14.3
NSE VIX	17.4	18.8	13.9

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,590	0.8 %	5.2 %	Energy	14,597	1.6 %	9.8 %
IT	14,887	0.6 %	17.2 %	Pharma	9,837	0.6 %	14.1 %
Metals	3,432	0.2 %	(3.0) %	Finance	10,628	0.8 %	3.6 %
Auto	9,103	0.8 %	(17.7) %	PSU	2,780	2.7 %	(2.6) %
FMCG	28,498	0.6 %	7.5 %	Real Estate	212	1.0 %	(28.5) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	869	5.7 %	(34.6) %	Indiabulls	907	(4.4) %	(27.1) %
Petronet L	224	4.0 %	(2.9) %	Eicher Mot	23,002	(1.8) %	(18.7) %
M & M	778	3.8 %	4.0 %	Bandhan Ba	464	(1.4) %	(2.5) %
Adani Port	333	3.8 %	(9.8) %	United Spi	526	(1.3) %	(19.4) %
Piramal En	2,330	3.7 %	(5.7) %	Cipla	640	(1.3) %	11.0 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (YoY) (JUL)	17-10-2018	12:30	CAD	-	0.025
Consumer Price Index Core (YoY) (JUL)	17-10-2018	12:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (JUL)	17-10-2018	12:30	CAD	-	0.001
CPI Core - Median (YoY) (JUL)	17-10-2018	12:30	CAD	-	0.02
CPI Core - Trim (YoY) (JUL)	17-10-2018	12:30	CAD	-	0.02
International Securities Transactions (Canadian dollar) (JUN)	17-10-2018	12:30	CAD	-	-
Euro-Zone Current Account s.a. (euros) (JUN)	17-10-2018	08:00	EUR	-	-
Euro-Zone Consumer Price Index (MoM) (JUL)	17-10-2018	09:00	EUR	-	0.001
Euro-Zone Consumer Price Index (YoY) (JUL F)	17-10-2018	09:00	EUR	-	0.02
Euro-Zone Consumer Price Index Core (YoY) (JUL F)	17-10-2018	09:00	EUR	-	0.011
BOJ Outright Bond Purchase 1~3 Years	17-10-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	17-10-2018	01:10	JPY	-	-
Leading Index (JUL)	17-10-2018	14:00	USD	-	0.005
U. of Mich. 1 Yr Inflation (AUG P)	17-10-2018	14:00	USD	-	0.029
U. of Mich. 5-10 Yr Inflation (AUG P)	17-10-2018	14:00	USD	-	0.024
U. of Mich. Current Conditions (AUG P)	17-10-2018	14:00	USD	-	114.4
U. of Mich. Expectations (AUG P)	17-10-2018	14:00	USD	-	87.3
U. of Mich. Sentiment (AUG P)	17-10-2018	14:00	USD	-	97.9
Baker Hughes U.S. Rig Count (AUG 17)	17-10-2018	17:00	USD	-	-

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