



17 Oct.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,478	0.1 %	(1.6) %
BSE SENSEX	38,599	0.2 %	(0.5) %
CNX BANK	28,611	0.3 %	(5.7) %
CNX MIDCAP	15,664	0.4 %	(14.6) %
CNX SMALLCAP	5,448	0.4 %	(19.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,002	(0.1) %	15.8 %
S&P 500	2,990	(0.2) %	19.3 %
FTSE 100	7,168	(0.6) %	6.4 %
HANG SENG	26,664	0.6 %	6.1 %
NIKKEI	22,473	1.2 %	14.9 %
SHANGHAI COMPOSITE	2,979	(0.4) %	20.8 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.19	0.5 %	2.5 %
EUR/USD	1.10	(0.0) %	(3.7) %
GBP/USD	1.27	0.8 %	(0.5) %
USD/JPY	108.56	0.2 %	(1.0) %
USD/AUD	1.48	0.1 %	4.1 %
USD/SGD	1.37	0.1 %	0.4 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	1.0 %	14.7 %
Gold(INR/10g)	38,203	(0.9) %	21.2 %
Gold Comex(USD/oz)	1,492	0.3 %	15.6 %
SILVER(INR/1Kg)	44,804	(2.2) %	17.1 %
Aluminium(USD/MT)	1,704	0.1 %	(8.3) %
Copper(USD/MT)	5,684	(1.1) %	(2.7) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.7	(0.0) %	(0.9) %

**Global Economy:** The US Fed's Beige Book said Wednesday the US economy expanded at a slight to modest pace over the past month. However, many businesses have lowered their outlooks for the next year. Manufacturing activity continued to edge lower, the report said. Eurozone inflation slowed to 0.8% in September from 1% in August, latest data from Eurostat showed Wednesday. This was the lowest inflation since November 2016. Euro area trade surplus increased to a seasonally adjusted EUR 20.3 billion in August from EUR 17.5 billion in July, data from Eurostat revealed Wednesday. Exports grew 0.4% from the previous month, while imports declined 1.2% in August. Europe passenger car registrations advanced 14.5% year-on-year in September, in contrast to an 8.4% decrease in August. Sales reached 1.2 million units in September. However, the agency said the strong growth was driven by a low base comparison as registrations logged a sharp decline in September 2018. UK consumer prices advanced 1.7% year-on-year in September, the same pace of growth as seen in August, figures from the Office for National Statistics showed Wednesday. On a monthly basis, consumer price edged up 0.1%. Core inflation that excludes energy, food, alcoholic beverages and tobacco, accelerated to 1.7% from 1.5%. Australia's leading index that indicates the likely pace of future economic activity weakened further in September. The Westpac- Melbourne Institute leading index dropped to -0.92% from -0.24% in August. The index suggested that the growth through the first half of 2020 is likely to remain below trend.

**Global Equities:** European stocks eased as investors eyed further clarity on the Brexit deal.

**Indian Economy:** International Monetary Fund (IMF) in its latest World Economic Outlook, released on Tuesday, projected India's growth rate at 6.1% in 2019 and noted that the Indian economy is expected to pick up at 7% in 2020 after India registered real growth rate of 6.8% in 2018. India's exports contracted by 6.57% to USD 26 billion in September mainly due to significant dip in shipments from key sectors such as petroleum, engineering, leather, chemicals, and gems & jewellery. Imports too declined by 13.85% to USD 36.89 billion, narrowing trade deficit to USD 10.86 billion in September, according to official data released on Tuesday. Trade deficit in September last year stood at USD 14.95 billion. Krishnamurthy Subramanian, Chief Economic Advisor (CEA), Ministry of Finance, Government of India today urged the Industry to capitalise on the measures announced by the government and RBI and start making the investments required to boost growth. India's fuel demand slipped to its lowest in more than two years in September, data from the Petroleum Planning and Analysis Cell (PPAC) showed. Consumption of fuel, a proxy for oil demand, totaled 16.01 million tonnes - its lowest since July 2017 - down around 0.3% compared with the same month last year.

**Equity Markets:** Key benchmark indices ended higher on Wednesday, tracking positive Asian cues and decent Q2 earnings. The key barometers advanced for fourth straight session even though the market breadth was tilted in favour of sellers. BSE Sensex rose 92.90 points or 0.24% to 38,598.99. The Nifty 50 index rose 43.25 points or 0.38% to 11,471.55.

**Corporate News:** TCS iON, a strategic unit of Tata Consultancy Services inaugurated its Artificial Intelligence (AI)-driven Command Center in Chennai that can monitor more than 6,000 of its unique examination venues across the country, in real-time. NALCO noted that acute shortage coal is affecting Nalco's Smelter Plant Operation. Short supply of coal has severely impacted Aluminium production of NALCO and also the cost of power. Quesst Corp has signed the Settlement cum Share Purchase Agreement with Trimax Smart Infraprojects (TSIPL) and Trimax IT Infrastructure and Services (Trimax IT).



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	304.2	48.3	13.4
MF(INR cr)	686.3	439.1	414.3

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	38,965	35,084	35,346
F&O(INR cr)	1,207,214	1,454,845	1,336,444

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.7	15.7
NSE VIX	16.4	17.2	17.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,539	(0.1) %	(5.9) %	Energy	15,833	0.3 %	(4.2) %
IT	15,345	0.9 %	(3.1) %	Pharma	7,475	0.7 %	(20.3) %
Metals	2,388	(0.4) %	(23.0) %	Finance	12,978	0.6 %	3.8 %
Auto	7,674	(0.2) %	(8.8) %	PSU	2,152	(0.7) %	(36.4) %
FMCG	30,899	(0.1) %	2.3 %	Real Estate	256	1.0 %	(4.1) %

### 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>
General In	261	20.0 %	5.8 %	Indiabulls	173	(8.5) %	(79.6) %
New India	114	20.0 %	(39.7) %	Bandhan Ba	584	(6.4) %	10.1 %
Vodafone I	7	6.5 %	(63.1) %	ICICI Lomb	1,207	(4.6) %	18.9 %
SBI Life I	877	4.7 %	46.7 %	Hero Motoc	2,602	(2.7) %	1.7 %
B P C L	512	4.5 %	30.7 %	Hindalco I	188	(2.4) %	(12.9) %

### 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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