



18 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,688	0.0 %	0.2 %
BSE SENSEX	39,216	0.2 %	0.9 %
CNX BANK	30,736	0.0 %	1.3 %
CNX MIDCAP	17,080	0.0 %	(6.8) %
CNX SMALLCAP	6,025	0.0 %	(10.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,220	(0.4) %	16.7 %
S&P 500	2,984	(0.7) %	19.1 %
FTSE 100	7,535	(0.6) %	11.9 %
HANG SENG	28,593	(0.1) %	13.8 %
NIKKEI	21,469	(0.3) %	9.7 %
SHANGHAI COMPOSITE	2,932	(0.2) %	18.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.48	0.2 %	(1.4) %
EUR/USD	1.12	(0.3) %	(1.9) %
GBP/USD	1.24	(1.0) %	(2.3) %
USD/JPY	108.12	0.2 %	(1.4) %
USD/AUD	1.42	(0.1) %	0.2 %
USD/SGD	1.36	(0.1) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(1.4) %	22.2 %
Gold(INR/10g)	34,428	(0.4) %	9.2 %
Gold Comex(USD/oz)	1,424	1.2 %	10.3 %
SILVER(INR/1Kg)	38,944	1.5 %	1.8 %
Aluminium(USD/MT)	1,819	0.1 %	(2.1) %
Copper(USD/MT)	5,922	17.1 %	1.4 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	(0.1) %	(0.6) %

Global Economy: The US Commerce Department said housing starts fell by 0.9% to an annual rate of 1.253 million in June after slipping by 0.4% to a revised rate of 1.265 million in May. The multi-family starts tumbled by 9.2% to 406,000, more than offsetting a 3.5% jump in single-family starts to a rate of 847,000. US Building permits also plunged by 6.1% to an annual rate of 1.220 million in June after rising by 0.7% to a revised rate of 1.299 million in May. The permits are now at lowest level since May 2017. A report from the US Federal Reserve said economic activity continued to expand at a modest pace overall from mid-May through early July. The Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts, noted the assessment of the economy was little changed from the prior reporting period. Eurozone inflation rose in June, according to final data from Eurostat. Consumer prices rose by a revised 1.3% year-on-year in June, slightly faster than the 1.2% rise in May. The flash estimate showed a steady growth of 1.2% in June. Europe's new car registrations fell in June the European Automobile Manufacturers Association or ACEA reported. Total Car sales in Europe decreased 7.8% year-on-year in June, reversing a 0.1% rise in May. This was the biggest fall seen so far this year. UK consumer price inflation remained stable at the central bank target in June. However, factory gate inflation eased to the lowest in nearly three years in June, data from the Office for National Statistics showed. UK consumer prices increased 2% year-on-year in June, the same pace of growth as seen in May. Fitch Ratings retained Japan's sovereign ratings at 'A' with a 'stable' outlook International Monetary Fund trimmed its forecast for Russian economic growth in 2019 to 1.2% from 1.4% after a weak first quarter, saying broader reforms would be needed for stronger growth. Westpac- Melbourne Institute Leading Index that indicates likely pace of economic activity in Australia over the next nine months, rose to -0.02% in June from -0.47% in May. Singapore's Non-oil domestic exports declined 17.3% year-on-year in June, after decreasing 16.3% in May.

Global Equities: US President Donald Trump threatened to impose tariffs on another \$325 billion worth of Chinese goods. Global markets witnessed dull activity.

Indian Economy: Union Cabinet chaired by Prime Minister Narendra Modi has approved the extension of the term of Fifteenth Finance Commission up to 30th November, 2019. Government says extension to the Commission will enable it to examine various comparable estimates for financial projections in view of reforms and the new realities to finalise its recommendations for the period 2020-2025. Total number of employees benefited under Pradhan Mantri Rojgar Protsahan Yojana (PMRPY) from 01.04.2016 to 31.03.2019 is 1.18 crore. Ministry of Petroleum & Natural Gas stated that a total of 406 districts are set to be covered for Providing Piped Natural Gas. Going by the current rate at which India is importing chemicals, from slightly above Rs 1,000 crore in 2004-05 to net import of Rs 1,40,000 crore in 2018-19, the country's net import of chemicals may cross Rs 3 lakh crore by 2024-25, according to Department of Chemicals & Petrochemicals.

Equity Markets: Key equity benchmarks ended higher for third consecutive trading session, backed by firmness in banks and IT shares. The Nifty failed to close above 11,700 mark after briefly crossing that level in intraday trade. Gains were capped amid weakness in other Asian shares. The Sensex rose 84.60 points or 0.22% to settle at 39,215.64, its highest closing level since 5 July 2019. The Nifty 50 index rose 24.90 points or 0.21% to settle at 11,687.50.

Corporate News: Oil India has emerged as the biggest winner of oil & gas blocks under Open Acreage Licensing Policy (OALP) rounds II & III by winning 12 blocks out of 32 blocks for which bids were submitted by leading Operators. Newgen Software announced that it has been granted Patent Number 316146, entitled "Automated Quality and Usability Assessment of Scanned Documents". Nestle said that its MAGGI Fusian noodles, have garnered overwhelming consumer response on Amazon Prime Days, witnessing an equivalent of 2.5 lakh single units being sold over a two day period, with orders coming from



29 states of India.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(52.3)	(68.5)	51.0
MF(INR cr)	604.5	177.6	123.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,364	30,955	33,817
F&O(INR cr)	1,019,816	1,116,268	1,211,467

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.0	13.2	14.9
NSE VIX	11.8	13.1	18.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,736	0.5 %	1.3 %	Energy	15,518	(0.8) %	(6.1) %
IT	15,676	0.6 %	(1.0) %	Pharma	8,331	(0.2) %	(11.1) %
Metals	2,849	0.1 %	(8.2) %	Finance	13,485	0.5 %	7.9 %
Auto	7,648	(1.0) %	(9.1) %	PSU	3,178	1.1 %	(6.1) %
FMCG	29,614	0.8 %	(1.9) %	Real Estate	286	0.2 %	7.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
HDFC AMC	2,075	4.3 %	33.4 %	Yes Bank	98	(5.2) %	(64.3) %
Indiabulls	668	3.4 %	(21.1) %	Eicher Mot	18,434	(3.2) %	(8.1) %
Colgate-Pa	1,167	2.9 %	(7.2) %	GAIL (Indi	143	(2.7) %	(19.1) %
UPL	660	2.8 %	5.9 %	New India	135	(2.5) %	(28.8) %
Bank of Ba	127	2.5 %	(4.1) %	Bandhan Ba	539	(2.2) %	1.7 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JUN)	18-07-2019	1:30	AUD	-	-
Full Time Employment Change (JUN)	18-07-2019	1:30	AUD	-	-
NAB Business Confidence (2Q)	18-07-2019	1:30	AUD	-	(1)
Part Time Employment Change (JUN)	18-07-2019	1:30	AUD	-	-
Participation Rate (JUN)	18-07-2019	1:30	AUD	-	0.66
RBA Foreign Exchange Transaction (Australian dollar) (JUN)	18-07-2019	1:30	AUD	-	-
RBA FX Transactions Government (JUN)	18-07-2019	1:30	AUD	-	-
RBA FX Transactions Other (JUN)	18-07-2019	1:30	AUD	-	-
Unemployment Rate (JUN)	18-07-2019	1:30	AUD	-	0.052
ADP Canada Releases June Payroll Estimates	18-07-2019	12:30	CAD	-	-
Teranet/National Bank HP Index (JUN)	18-07-2019	12:30	CAD	-	223.26
Teranet/National Bank HPI (MoM) (JUN)	18-07-2019	12:30	CAD	-	0.005
Teranet/National Bank HPI (YoY) (JUN)	18-07-2019	12:30	CAD	-	0.007
Exports (MoM) (JUN)	18-07-2019	6:00	CHF	-	(0.012)
Imports (MoM) (JUN)	18-07-2019	6:00	CHF	-	0.007
Swiss Watch Exports (YoY) (JUN)	18-07-2019	6:00	CHF	-	0.114
Bank of England Bank Liabilities/Credit Conditions Surveys	18-07-2019	8:30	GBP	-	-
Retail Sales Ex Auto Fuel (MoM) (JUN)	18-07-2019	8:30	GBP	-	(0.003)
Retail Sales Ex Auto Fuel (YoY) (JUN)	18-07-2019	8:30	GBP	-	0.022
Retail Sales Inc Auto Fuel (MoM) (JUN)	18-07-2019	8:30	GBP	-	(0.005)
Retail Sales Inc Auto Fuel (YoY) (JUN)	18-07-2019	8:30	GBP	-	0.023
National Consumer Price Index (YoY) (JUN)	18-07-2019	23:30	JPY	-	0.007
National Consumer Price Index Ex-Fresh Food (YoY) (JUN)	18-07-2019	23:30	JPY	-	0.008
Natl CPI Ex Fresh Food, Energy (YoY) (JUN)	18-07-2019	23:30	JPY	-	0.005
Foreign Buying Japan Bonds (JUL 12)	18-07-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUL 12)	18-07-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 12)	18-07-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 12)	18-07-2019	23:50	JPY	-	-
Telcel Canada Services Sales (YoY) (JUN)	18-07-2019	4:00	MXN	-	(0.100)



Continuing Claims (JUL 6)	18-07-2019	12:30	USD	-	-
Initial Jobless Claims (JUL 13)	18-07-2019	12:30	USD	-	-
Philadelphia Fed Business Outlook (JUL)	18-07-2019	12:30	USD	-	0.3
Fed's Bostic Speaks to Clarksville Chamber in Tennessee	18-07-2019	13:30	USD	-	-
Leading Index (JUN)	18-07-2019	14:00	USD	-	0
EIA Natural Gas Storage Change (JUL 12)	18-07-2019	14:30	USD	-	81
U.S. to Sell 4-Week Bills	18-07-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	18-07-2019	15:30	USD	-	-
U.S. to Sell 10-Year TIPS	18-07-2019	17:00	USD	-	-
Fed's Williams Speaks on Monetary Policy	18-07-2019	18:15	USD	-	-

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