



18 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,407	0.3 %	11.7 %
BSE SENSEX	37,586	(1.3) %	13.4 %
CNX BANK	26,879	0.2 %	10.5 %
CNX MIDCAP	19,353	0.5 %	1.3 %
CNX SMALLCAP	7,433	0.4 %	(6.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,062	(0.4) %	5.0 %
S&P 500	2,889	(0.6) %	7.2 %
FTSE 100	7,302	(0.0) %	(4.5) %
HANG SENG	26,933	(1.3) %	(11.7) %
NIKKEI	23,095	1.2 %	(1.8) %
SHANGHAI COMPOSITE	2,652	(1.1) %	(20.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.50	0.4 %	13.9 %
EUR/USD	1.17	0.4 %	(2.8) %
GBP/USD	1.31	0.8 %	(2.7) %
USD/JPY	111.87	0.4 %	(0.8) %
USD/AUD	1.39	0.2 %	9.1 %
USD/SGD	1.37	0.1 %	2.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	(0.1) %	14.1 %
Gold(INR/10g)	30,614	0.2 %	4.3 %
Gold Comex(USD/oz)	1,204	0.4 %	(8.0) %
SILVER(INR/1Kg)	36,702	0.4 %	(4.9) %
Aluminium(USD/MT)	1,985	(1.5) %	(12.0) %
Copper(USD/MT)	5,860	(1.5) %	(18.4) %

FIXED INCOME

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

Global Economy: The New York Fed said its general business conditions index slipped to 19.0 in September from 25.6 in August, although a positive reading continues to indicate growth in regional manufacturing activity. Eurozone inflation came in at 2% in August versus 2.1% in July, which was the highest since December 2012, final data from Eurostat revealed Monday. The European Central Bank targets "below, but close to 2%" inflation. Core inflation that excludes energy, food, alcohol and tobacco, slowed marginally to 1% in August, as initially estimated, from 1.1% a month ago. Overall inflation in EU28 slowed marginally to 2.1% in August from 2.2% a month ago.

Global Equities: Global shares witnessed steep selling pressure amid reports US could soon announce a new round of tariffs on Chinese imports, setting the stage for possible reprisals by Beijing.

Indian Economy: CBDT Chairman Sushil Chandra has expressed confidence in exceeding Rs 11.5 lakh crore direct tax collection target in current fiscal, according to media reports. In 2018-19 budget, the government had projected a 14.3% rise in direct tax collections to Rs 11.5 lakh crore. Recent However, Controller General of Accounts data shows that the direct tax collections grew at just 4.2% on year to Rs 1.54 lakh crore in April-June.

Equity Markets: The Sensex fell well below the psychologically important 38,000 mark as a recovery from near six week lows proved short lived. Financials led the tumble as profit selling was back with the vengeance after latest gains. The S&P BSE Sensex closed at 37,586, down 505 points while the broader Nifty50 index settled at 11,378, down 137 points. These moves in stocks rattled the INR. The domestic currency slipped to an intra-day low of 72.69 against the dollar. The domestic unit on Friday had soared by more than half a percent to break under 72 per dollar mark but gave back all these gains.

Corporate News: The government on Monday proposed the amalgamation of state-owned Bank of Baroda (BoB), Dena Bank and Vijaya Bank to create India's third-largest bank. The move is part of the reforms initiated in the public sector banking segment. IT major Infosys has doubled its investment in US-based software firm TidalScale by putting in an additional \$1.5 million (around Rs 11 crore) through the Infosys Innovation Fund. Indraprastha Gas has received letter dated 13 September 2018 from Petroleum and Natural Gas Regulatory Board (PNGRB) for grant of authorization for development of City Gas Distribution (CGD) network in the Geographical Area of Meerut (Except areas already authorized), Muzaffarnagar & Shamli Districts. Cholamandalam Investment & Finance Company has issued unlisted Non Convertible Debentures (NCDs) in tenors of 3 to 5 years for Rs 1056.90 crore (\$150 million) to Asian Development Bank (ADB). Oriental Bank of Commerce (OBC) could be under pressure as Rating agency ICRA downgraded the long-term ratings of state-run bank's borrowing programme to A+ from AA-, with a negative outlook, on weak financial performances and high NPA level.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	94.7	(10.3)	(25.6)
MF(INR cr)	134.5	455.7	372.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	32,254	37,963	34,144
F&O(INR cr)	794,587	1,158,075	915,940

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.1	13.5	14.2
NSE VIX	14.5	14.2	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	26,820	(1.3) %	10.2 %	Energy	15,609	(1.2) %	17.4 %
IT	16,120	0.3 %	26.9 %	Pharma	10,504	(1.4) %	21.8 %
Metals	3,705	(0.2) %	4.7 %	Finance	11,224	(1.7) %	9.4 %
Auto	10,731	(0.9) %	(3.0) %	PSU	3,056	(1.3) %	7.1 %
FMCG	30,560	(1.4) %	15.3 %	Real Estate	269	1.1 %	(9.2) %

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>
Oracle Fin	4,490	5.6 %	14.0 %	ICICI Pru	362	(4.3) %	(5.8) %
General In	348	3.5 %	(6.0) %	SBI Life I	643	(4.1) %	(6.0) %
Vodafone I	48	2.9 %	(38.7) %	L&T Fin.Ho	156	(3.3) %	(2.9) %
B P C L	364	2.7 %	(14.0) %	NMDC	120	(3.0) %	2.1 %
Siemens	982	2.4 %	(10.9) %	Ashok Leyl	127	(2.9) %	(13.9) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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