



18 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,818	0.0 %	(7.3) %
BSE SENSEX	36,481	(1.7) %	(5.5) %
CNX BANK	27,132	0.0 %	(10.5) %
CNX MIDCAP	15,630	0.0 %	(14.7) %
CNX SMALLCAP	5,497	0.0 %	(18.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,111	0.1 %	16.2 %
S&P 500	3,006	0.3 %	19.9 %
FTSE 100	7,320	(0.0) %	8.7 %
HANG SENG	26,790	(1.2) %	6.6 %
NIKKEI	22,001	0.1 %	12.5 %
SHANGHAI COMPOSITE	2,978	(1.7) %	20.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.49	(0.1) %	3.0 %
EUR/USD	1.10	0.1 %	(3.6) %
GBP/USD	1.24	0.8 %	(2.4) %
USD/JPY	107.91	0.1 %	(1.6) %
USD/AUD	1.46	(0.1) %	2.4 %
USD/SGD	1.37	(0.3) %	0.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	(5.4) %	26.8 %
Gold(INR/10g)	37,855	0.2 %	20.1 %
Gold Comex(USD/oz)	1,510	0.1 %	17.0 %
SILVER(INR/1Kg)	46,114	0.6 %	20.5 %
Aluminium(USD/MT)	1,747	(1.4) %	(6.0) %
Copper(USD/MT)	5,762	(2.0) %	(1.3) %

FIXED INCOME

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

Global Economy: The US industrial production climbed by 0.6% in August after edging down by a revised 0.1% in August, the Federal Reserve reported on Tuesday. The Fed noted factory output has increased 0.2% per month over the past four months after having decreased 0.5% per month during the first four months of the year. The NAHB/Wells Fargo Housing Market Index inched up to 68 in September from an upwardly revised August reading of 67. With the uptick, the housing market index reached its highest level since a matching reading in October of 2018. The US President Donald Trump said US has reached an initial trade agreement on tariff barriers and digital trade with Japan. Germany's economic sentiment saw a sharp improvement in September, after a slump in August, survey data from the think tank ZEW showed Tuesday. The ZEW investor confidence index surged to -22.5 from -44.1 in August. The score remained below the long-term average of 21.5 points though. Singapore's non-oil domestic exports (NODX) declined in August, data from Enterprise Singapore revealed on Tuesday. NODX fell 8.9% year-on-year in August, after an 11.4% fall in July. Export of electronic goods decreased by 25.9% annually in August, following the 24.2% decrease in the previous month. Australia house prices were down 0.7% on quarter in the second quarter of 2019, the Australian Bureau of Statistics said on Tuesday, following the 3% drop in the three months prior. On a yearly basis, house prices fell 7.4%.

Global Equities: Investors waited for the US Fed interest rate policy meeting this week. Chinese shares fell sharply ahead of the next round of US-China trade talks. The benchmark Shanghai Composite index slumped 1.74%.

Indian Economy: Ministry of Mines has allowed SAIL to offload in a year up to a quantity equivalent to maximum 25% of total iron ore production in the previous year. It will be subject to clearance from the respective State Governments, where the mines are located, after following due procedure. Ministry of Commerce & Industry through Export Credit Guarantee Corporation (ECGC) has introduced a new Export Credit Insurance Scheme (ECIS) called NIRVIK to enhance loan availability and ease the lending process. Labour Minister Santosh Gangwar said over 6 crore EPFO accounts will be credited with interest amount at 8.65% rate for 2018-19 ahead of the festival season. Petrol and diesel prices saw the biggest hike in nearly two months over spike in global oil prices following attacks on Saudi Arabian crude oil facilities. Petrol price was increased by 14 paisa per litre to Rs 72.17 and diesel by 15 paisa to Rs 65.58 per litre in Delhi.

Equity Markets: Key benchmark indices tumbled for second consecutive day on Tuesday, following a surge in global crude oil prices after attacks on Saudi Arabia's oil facilities. Selling was seen across all sectors with auto and realty shares declining the most. S&P BSE Sensex fell 642.22 points or 1.73% to 36,481.09. The Nifty 50 index fell 185.90 points or 1.69% to 10,817.60. After opening at 11,000 mark, the 50-unit Nifty quickly descended in the morning trade. The index continued its downtrend and breached 10,900 mark in the afternoon. The Nifty managed to stabilize at 10,800 level and closed above that level. NSE India VIX jumped 6.97% to 15.995.

Corporate News: IT counters could be in focus. Indian Rupee tumbled amid a sharp slide in local stocks and latest jump in global crude oil futures. INR closed at 71.78 per US dollar, falling 18 basis points on the day. Metal counters can see some weakness as COMEX Copper tumbled for a second session on poor Chinese industrial production data and profit selling after recent surge to six week top. Sunteck Realty Ltd has acquired a prime project near Mumbai's Lokhandwala, Off New Link Road, Andheri (West) with the potential for development of approx. 1.1 mn sq.ft in saleable area and a revenue of over Rs 2,500 crore in the next 4-5 years. Ahluwalia Contracts (India)Limited has secured new order of Rs.407 Crores for Construction of Medical College (Civil Works)at Village Koriyawas in Mohindergarh Distt.Rewari (Haryana) and other orders aggregating to Rs.90.36 Crores (approx).





FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(110.8)	(58.2)	(1.5)
MF(INR cr)	395.9	557.9	395.6

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,567	32,446	34,302
F&O(INR cr)	1,366,982	1,354,896	1,296,388

MARKET VOLATILITY

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

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,132	(2.6) %	(10.5) %	Energy	14,336	(1.4) %	(13.3) %
IT	15,626	(0.7) %	(1.4) %	Pharma	7,934	(1.7) %	(15.4) %
Metals	2,376	(2.7) %	(23.4) %	Finance	12,111	(2.3) %	(3.1) %
Auto	7,021	(3.8) %	(16.6) %	PSU	2,389	(3.7) %	(29.4) %
FMCG	28,675	(0.3) %	(5.0) %	Real Estate	256	(3.7) %	(4.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
GAIL (Indi	132	1.7 %	(25.6) %	Hero Motoc	2,569	(6.2) %	0.4 %
Godrej Con	646	1.3 %	(4.5) %	Tata Motor	122	(5.1) %	(34.9) %
Titan Comp	1,158	0.8 %	3.4 %	Tata Motor	56	(5.0) %	(39.2) %
Hind. Unil	1,831	0.8 %	8.4 %	Axis Bank	640	(4.5) %	(16.3) %
Asian Pain	1,531	0.6 %	2.6 %	Tata Steel	345	(4.5) %	(35.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (AUG)	18-09-2019	0:30	AUD	-	0.0014
Consumer Price Index (AUG)	18-09-2019	12:30	CAD	-	137
Consumer Price Index (YoY) (AUG)	18-09-2019	12:30	CAD	-	0.02
Consumer Price Index Core (YoY) (AUG)	18-09-2019	12:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (AUG)	18-09-2019	12:30	CAD	-	0.005
CPI Core- Median (YoY)% (AUG)	18-09-2019	12:30	CAD	-	0.021
CPI Core- Trim (YoY)% (AUG)	18-09-2019	12:30	CAD	-	0.021
EU 25 New Car Registrations (AUG)	18-09-2019	6:00	EUR	-	(0.078)
Euro-Zone Construction Output s.a. (MoM) (JUL)	18-09-2019	9:00	EUR	-	0
Euro-Zone Construction Output w.d.a. (YoY) (JUL)	18-09-2019	9:00	EUR	-	0.01
Euro-Zone Consumer Price Index (MoM) (AUG)	18-09-2019	9:00	EUR	-	(0.005)
Euro-Zone Consumer Price Index (YoY) (AUG F)	18-09-2019	9:00	EUR	-	0.01
Euro-Zone Consumer Price Index Core (YoY) (AUG F)	18-09-2019	9:00	EUR	-	0.009
Consumer Price Index (MoM) (AUG)	18-09-2019	8:30	GBP	-	0
Consumer Price Index (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.021
Core Consumer Price Index (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.019
CPIH (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.02
House Price Index (YoY) (JUL)	18-09-2019	8:30	GBP	-	0.009
Producer Price Index Input n.s.a. (MoM) (AUG)	18-09-2019	8:30	GBP	-	0.009
Producer Price Index Input n.s.a. (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.013
Producer Price Index Output Core n.s.a. (MoM) (AUG)	18-09-2019	8:30	GBP	-	0.004
Producer Price Index Output Core n.s.a. (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.02
Producer Price Index Output n.s.a. (MoM) (AUG)	18-09-2019	8:30	GBP	-	0.003
Producer Price Index Output n.s.a. (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.018
Retail Price Index (AUG)	18-09-2019	8:30	GBP	-	289.5
Retail Price Index (MoM) (AUG)	18-09-2019	8:30	GBP	-	0
Retail Price Index (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.028
Retail Price Index Ex Mort Int.Payments (YoY) (AUG)	18-09-2019	8:30	GBP	-	0.027
Green Domestic Product (YoY) (QO)	18-09-2019	00:45	NZD	-	0.025



Gross Domestic Product s.a. (QoQ) (2Q)	18-09-2019	22:45	NZD	-	0.006
MBA Mortgage Applications (SEP 13)	18-09-2019	11:00	USD	-	-
Building Permits (AUG)	18-09-2019	12:30	USD	-	-
Building Permits (MoM) (AUG)	18-09-2019	12:30	USD	-	0.084
Housing Starts (AUG)	18-09-2019	12:30	USD	-	-
Housing Starts (MoM) (AUG)	18-09-2019	12:30	USD	-	(0.04)
DOE Cushing OK Crude Inventory (SEP 13)	18-09-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 13)	18-09-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (SEP 13)	18-09-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (SEP 13)	18-09-2019	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (SEP 18)	18-09-2019	18:00	USD	-	0.02
FOMC Rate Decision (Upper Bound) (SEP 18)	18-09-2019	18:00	USD	-	0.0225
Interest Rate on Excess Reserves (SEP 19)	18-09-2019	18:00	USD	-	0.021
Powell Holds Post-FOMC Meeting Press Conference	18-09-2019	18:30	USD	-	-

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