



18 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,598	0.1 %	(0.6) %
BSE SENSEX	39,052	1.2 %	1.2 %
CNX BANK	28,989	0.0 %	(4.4) %
CNX MIDCAP	15,887	0.0 %	(13.3) %
CNX SMALLCAP	5,473	0.0 %	(18.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,026	0.1 %	15.9 %
S&P 500	2,998	0.3 %	19.6 %
FTSE 100	7,182	0.2 %	6.7 %
HANG SENG	26,848	0.7 %	6.8 %
NIKKEI	22,452	(0.1) %	14.8 %
SHANGHAI COMPOSITE	2,977	(0.1) %	20.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.25	0.6 %	2.6 %
EUR/USD	1.10	0.2 %	(3.5) %
GBP/USD	1.28	1.6 %	0.3 %
USD/JPY	108.72	0.4 %	(0.8) %
USD/AUD	1.48	0.4 %	4.4 %
USD/SGD	1.37	0.2 %	0.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	1.0 %	15.8 %
Gold(INR/10g)	38,227	0.1 %	21.2 %
Gold Comex(USD/oz)	1,495	0.2 %	15.8 %
SILVER(INR/1Kg)	45,144	0.8 %	18.0 %
Aluminium(USD/MT)	1,726	1.3 %	(7.1) %
Copper(USD/MT)	5,727	0.7 %	(1.9) %

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 said industrial production fell by 0.4% in September after climbing by an upwardly revised 0.8% in August. The Philly Fed said its diffusion index for current general activity dropped to 5.6 in October after falling to 12.0 in September. Commerce Department said housing starts pulled back from a decade high and plunged by 9.4% to an annual rate of 1.256 million in September after soaring by 15.1% to a revised 1.386 million in August. UK retail sales volume, including auto fuel, was unchanged from the previous month, following a 0.3% drop in August, data from the Office for National Statistics showed Thursday. Excluding auto fuel, retail sales volume climbed 0.2%, in contrast to a 0.3% fall a month ago. On a yearly basis, retail sales volume growth accelerated to 3.1% in September from 2.6% in August. Singapore's non-oil domestic exports continued to fall in September albeit at a slower pace, data from Enterprise Singapore showed Thursday. Non-oil domestic exports decreased 8.1% year-on-year in September, following a 9% fall in August. Unemployment rate in Australia came in at a seasonally adjusted 5.2% in September compared to 5.3% in August. The Australian economy added 14,700 jobs last month following the increase of 34,700 jobs in the previous month.

Global Equities: European markets edged up as the UK and EU reached a Brexit deal. US stocks ended marginally higher.

Indian Economy: Commercial paper (CP) issuance during Apr-Aug 2019 declined by around 10% to Rs.10267 billion as compared to Rs.11343 billion during the same period previous year, the State Bank of India (SBI), noted in the latest edition of Ecowrap. Net CP issuance during the period is only Rs.141 billion as compared to Rs.2597 billion last year. A latest survey by Knight Frank - FICCI - NAREDCO - titled Real Estate Sentiment Index Q3 2019, shows that the current sentiments of the real estate stakeholders in India have plummeted further to 42 in the July-September quarter of 2019 (Q3 2019) from the preceding quarter - a level previously seen during the heightened uncertainty period of pre-election in the first quarter of 2014 and the demonetisation period (41) in the last quarter of 2016.

Equity Markets: Key benchmark indices rallied on Thursday, supported by banks, auto and FMCG stocks. The barometer index, the BSE Sensex, rose 453.07 points or 1.17% to 39,052.06, as per the provisional closing data. The Nifty 50 index rose 122.35 points or 1.07% to 11,586.35, as per the provisional closing data.

Corporate News: Cipla announced the acquisition of a novel and patented anti-infective product, Elores, from Venus Remedies (VRL) for the Indian market to further strengthen its presence in the branded Indian critical care space and as a part of its agenda to contribute to the fight against Anti-Microbial Resistance (AMR). Ambuja Cements and Reliance Industries will unveil their quarterly results today, 18 October 2019. Zee Entertainment Enterprises' consolidated net profit rose 6.87% to Rs 413.23 crore on 7.62% rise in total income to Rs 2190.13 crore in Q2 September 2019 over Q2 September 2018. South Indian Bank net profit rose 20.46% to Rs 84.48 crore on 18.81% rise in total income to Rs 2203.18 crore in Q2 September 2019 over Q2 September 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	125.4	56.0	14.2
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)	39,896	35,522	35,381
F&O(INR cr)	2,650,662	1,563,556	1,346,326

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.6	15.7
NSE VIX	15.9	17.1	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	28,989	1.6 %	(4.4) %	Energy	15,977	0.9 %	(3.4) %
IT	15,282	(0.4) %	(3.5) %	Pharma	7,533	0.8 %	(19.6) %
Metals	2,411	0.9 %	(22.3) %	Finance	13,145	1.3 %	5.2 %
Auto	7,914	3.1 %	(5.9) %	PSU	2,217	3.0 %	(34.5) %
FMCG	31,332	1.4 %	3.8 %	Real Estate	258	0.6 %	(3.5) %

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>
New India	137	20.0 %	(27.7) %	Vodafone I	6	(3.8) %	(64.5) %
Yes Bank	47	15.5 %	(82.8) %	Bandhan Ba	569	(2.6) %	7.2 %
Indiabulls	198	14.4 %	(76.6) %	Shree Ceme	18,190	(2.2) %	(3.2) %
Tata Motor	62	11.2 %	(32.5) %	Oracle Fin	3,090	(2.0) %	(8.8) %
Tata Motor	140	10.8 %	(25.5) %	Vedanta	148	(1.1) %	(21.5) %

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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