



19 Jun.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,800	0.0 %	5.8 %
BSE SENSEX	35,548	(0.2) %	6.9 %
CNX BANK	26,409	0.0 %	8.6 %
CNX MIDCAP	18,747	0.0 %	(1.8) %
CNX SMALLCAP	7,567	0.0 %	(4.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,987	(0.4) %	0.7 %
S&P 500	2,774	(0.2) %	2.9 %
FTSE 100	7,631	(0.0) %	(0.2) %
HANG SENG	30,309	(0.4) %	(0.7) %
NIKKEI	22,680	(0.8) %	(3.5) %
SHANGHAI COMPOSITE	3,022	(0.7) %	(9.7) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.99	0.5 %	6.8 %
EUR/USD	1.16	0.6 %	(3.1) %
GBP/USD	1.33	0.1 %	(1.8) %
USD/JPY	110.10	(0.5) %	(2.3) %
USD/AUD	1.35	0.6 %	5.4 %
USD/SGD	1.35	0.5 %	1.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(2.7) %	7.8 %
Gold(INR/10g)	30,693	(1.2) %	4.5 %
Gold Comex(USD/oz)	1,282	(1.8) %	(2.0) %
SILVER(INR/1Kg)	40,160	(2.7) %	4.0 %
Aluminium(USD/MT)	2,239	(1.7) %	(0.8) %
Copper(USD/MT)	7,136	(0.8) %	(0.6) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.5 %

**Global Economy:** The US National Association of Home Builders released a report on Monday unexpectedly showing a deterioration in U.S. homebuilder confidence in the month of June. The report said the NAHB/Wells Fargo Housing Market Index dipped to 68 in June from 70 in May. The average asking price for a house in the United Kingdom was up 0.4% on month in June, property tracking website Rightmove said. That followed the 0.8% increase in May. On a yearly basis, house prices advanced 1.7%, accelerating from 1.1% in the previous month. Japan logged its first trade deficit in three months in May on a surge in imports of aircraft and aircraft engines from the United States, data from Japan's finance ministry showed Monday. Japan posted a trade deficit of 578.3 billion Yen in May.

**Global Equities:** DOW dropped for a fifth session as investors digested the escalation in trade tensions between the US and China after both countries announced tariffs last week. Markets in China, Hong Kong, Taiwan and Indonesia were closed on Monday for holidays.

**Indian Economy:** India's merchandise exports jumped 20.2% to US\$ 28.86 billion in May 2018 over a year ago. Meanwhile, merchandise imports moved up 14.9% to US\$ 43.48 billion. The trade deficit rose 5.6% to US\$ 14.62 billion in May 2018 from US\$ 13.84 billion in May 2017. Oil imports surged 49.5% to US\$ 11.50 billion, while the non-oil imports rose 6.0% to US\$ 31.98 billion in May 2018 over May 2017. The share of oil imports in total imports was 26.4% in May 2018, compared with 20.3% in May 2017. The price of India's basket of crude oil galloped 48.9% to US\$ 75.31 per barrel in May 2018 over May 2017.

**Equity Markets:** Local markets dropped at the start of the week. The barometer index, the S&P BSE Sensex, fell 73.88 points or 0.21% to settle at 35,548.26. The Nifty 50 index fell 17.85 points or 0.17% to settle at 10,799.85. Shares from IT and metal sectors declined. Global stocks fell as US-China trade war intensified. Among secondary barometers, the BSE Mid-Cap index fell 0.18%, outperforming the Sensex. The BSE Small-Cap index fell 0.77%, underperforming the Sensex.

**Corporate News:** Tata Consultancy Services (TCS) opened its new delivery center in Suresnes, France. The delivery center, which is located in the Parisian region, can accommodate up to 230 employees and benefits from highly secure connectivity, a robust infrastructure and secure spaces, guaranteeing the best quality service and productivity for customers. Titan Company said that TimeProducts (TTPL) has ceased to be a subsidiary of the company with effect from 18 June 2018 consequent upon the company transferring its entire stake in TTPL to Danlaw Technologies India. Goa Carbon said that the operations at the company's Paradeep Unit at Village Udayabata, Odisha has been put on temporary halt due to the obstructions by the contract workers from 6:00 a.m. on 16 June 2018 with their sudden demand for raising of their retirement age. Manufacturers of commercial vehicles, passenger vehicles and two wheelers are expected to incur a total capex of about Rs 58,000 crore over the next two fiscals - 2018-19 and 2019-2020. This capex will be 30% higher than the preceding two fiscals. The higher capex for the next two years is driven mainly by healthy demand prospects and regulations, according to a report of rating agency Crisil.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(241.9)	(26.0)	(49.9)
MF(INR cr)	98.3	244.1	484.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	25,264	29,297	33,445
F&O(INR cr)	467,440	770,131	803,707

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.0	12.4	15.3
NSE VIX	12.4	12.8	13.5

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,409	(0.0) %	8.6 %	Energy	14,031	0.7 %	5.6 %
IT	14,024	(0.7) %	10.4 %	Pharma	9,319	0.0 %	8.1 %
Metals	3,480	(1.7) %	(1.7) %	Finance	10,963	(0.1) %	6.8 %
Auto	11,203	0.3 %	1.3 %	PSU	3,022	(0.4) %	5.9 %
FMCG	28,712	(0.2) %	8.3 %	Real Estate	287	(0.4) %	(3.3) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
H P C L	322	5.1 %	(6.5) %	Sun TV Net	883	(2.8) %	2.7 %
ICICI Bank	293	3.7 %	11.9 %	Hindalco I	231	(2.7) %	9.3 %
I O C L	174	3.7 %	2.0 %	Vedanta	232	(2.7) %	(17.7) %
Idea Cellu	62	2.6 %	(20.0) %	Container	1,233	(2.4) %	(0.7) %
P & G Hygi	9,995	2.6 %	6.4 %	Oil India	217	(2.4) %	(4.4) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
House Price Index (QoQ) (1Q)	19-06-2018	1:30	AUD	-	0.01
House Price Index (YoY) (1Q)	19-06-2018	1:30	AUD	-	0.05
RBA June Meeting Minutes	19-06-2018	1:30	AUD	-	-
SECO June 2018 Economic Forecasts	19-06-2018	5:45	CHF	-	-
ECB's Lane and Praet, St. Louis Fed's Bullard speak in Sintra, Portugal	19-06-2018	11:00	EUR	-	-
ECB President Draghi speaks in Sintra, Portugal	19-06-2018	8:00	EUR	-	-
Euro-Zone Current Account n.s.a. (euros) (APR)	19-06-2018	8:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (APR)	19-06-2018	8:00	EUR	-	-
ECB's Peter Praet is chairing a panel in Sintra, Portugal	19-06-2018	8:30	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (APR)	19-06-2018	9:00	EUR	-	(0.003)
Euro-Zone Construction Output w.d.a. (YoY) (APR)	19-06-2018	9:00	EUR	-	0.008
BOJ Minutes of Policy Meeting	19-06-2018	23:50	JPY	-	-
Westpac Consumer Confidence (2Q)	19-06-2018	22:00	NZD	-	111.2
BoP Current Account Balance (1Q)	19-06-2018	22:45	NZD	-	-
Current Account Gross Domestic Product Ratio YTD (1Q)	19-06-2018	22:45	NZD	-	(0.027)
Building Permits (MAY)	19-06-2018	12:30	USD	-	-
Building Permits (MoM) (MAY)	19-06-2018	12:30	USD	-	(0.018)
Housing Starts (MAY)	19-06-2018	12:30	USD	-	-
Housing Starts (MoM) (MAY)	19-06-2018	12:30	USD	-	(0.037)
U.S. to Sell 4-Week Bills	19-06-2018	15:30	USD	-	-
U.S. to Sell USD26 Bln 52-Week Bills	19-06-2018	15:30	USD	-	-

..... End of Report .....