



19 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,769	0.7 %	0.9 %
BSE SENSEX	39,046	0.2 %	1.2 %
CNX BANK	30,586	0.8 %	0.9 %
CNX MIDCAP	17,458	0.7 %	(4.8) %
CNX SMALLCAP	6,219	0.6 %	(7.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,466	1.4 %	13.5 %
S&P 500	2,918	1.0 %	16.4 %
FTSE 100	7,443	1.2 %	10.5 %
HANG SENG	27,499	1.0 %	9.4 %
NIKKEI	20,973	(0.7) %	7.2 %
SHANGHAI COMPOSITE	2,890	0.1 %	17.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.78	0.6 %	0.5 %
EUR/USD	1.12	(0.6) %	(2.0) %
GBP/USD	1.26	(0.9) %	(1.4) %
USD/JPY	108.60	0.2 %	(0.9) %
USD/AUD	1.46	0.7 %	2.5 %
USD/SGD	1.37	0.3 %	0.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	3.8 %	15.8 %
Gold(INR/10g)	32,918	0.6 %	4.4 %
Gold Comex(USD/oz)	1,348	0.6 %	4.4 %
SILVER(INR/1Kg)	36,979	0.3 %	(3.4) %
Aluminium(USD/MT)	1,733	0.8 %	(6.7) %
Copper(USD/MT)	5,849	1.6 %	0.2 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	(0.0) %	(0.6) %

Global Economy: US housing starts slid by 0.9% to an annual rate of 1.269 million in May from an upwardly revised April estimate of 1.281 million, a report released by the Commerce Department on Tuesday showed. The pullback came as housing starts in the Northeast plummeted by 45.5% to a rate of 73,000 in May from 134,000 in April. Housing starts also slumped by 8% in the Midwest and fell by 2.4% in the West, but housing starts in the South soared by 11.2%. European Central Bank President Mario Draghi said on Tuesday that the central bank still has room to cut interest rates and measures to cushion the side effect from low interest rates. Speaking at the ECB Forum on Central Banking in Sintra, Portugal, Draghi said that further cuts in policy interest rates and mitigating measures to contain any side effects remain part of ECB tools. The ECB ended its massive EUR 2.6 trillion Asset Purchase Programme, which began in 2015, in December.

Global Equities: DOW jumped 1.4% after President Donald Trump said in a post on Twitter that he had a very good telephone conversation with Chinese President Xi Jinping and will have an extended meeting at the G20 summit next week.

Indian Economy: The air passenger traffic of domestic airlines has increased 3.0% to 122.07 lakh in May 2019 over 118.56 lakh in May 2018, while snapping 4.5% recorded for April 2019. However, the growth of air passenger traffic has moderated from 16.5% surge in May 2018. The first-year premium income of the life insurance sector surged 43.4% to Rs 18414.02 crore in May 2019. The private life insurers reported 35.3% surge in the premium collection at Rs 4917.34 crore, while Life Insurance Corporation (LIC) also showed 46.6% jump to Rs 13496.68 crore in May 2019.

Equity Markets: Domestic shares ended the volatile trading session with small gains on Tuesday. Gains were supported by firmness in IT shares. The Sensex settled above the psychological 39,000 level after moving above and below that level in intraday trade. The Nifty settled below 10,700 mark after regaining that level in intraday trade.

Corporate News: NMDC said that total production of iron ore on a provisional basis rose to 3.04 MT in May 2019 from 2.12 MT in May 2018. Total sales of iron ore on a provisional basis rose to 3.37 MT in May 2019 from 2.31 MT in May 2018. Canara Bank said that the board of directors of the bank, permitted to initiate the process of stake sale in part/full in Can Fin Homes (CFHL), as per the disinvestment policy of the bank. The permission is subject to disinvest at appropriate time depending on the market conditions and available options. HDFC Bank said that the Reserve Bank of India (RBI) has imposed a monetary penalty of Rs 1 crore on the bank for non-compliance with directions issued by RBI on Know Your Customer (KYC)/ Anti-Money Laundering (AML) Norms and on reporting of frauds.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(46.2)	0.2	85.2
MF(INR cr)	1,565.3	133.8	37.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,338	30,384	34,297
F&O(INR cr)	1,174,332	1,300,131	1,200,061

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.2	16.1	15.2
NSE VIX	14.6	14.8	20.6

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,351	0.3 %	0.1 %	Energy	15,904	0.7 %	(3.8) %
IT	16,323	0.6 %	3.0 %	Pharma	7,917	(0.7) %	(15.6) %
Metals	2,875	0.5 %	(7.3) %	Finance	13,230	0.1 %	5.8 %
Auto	7,859	(0.5) %	(6.6) %	PSU	3,012	0.2 %	(11.0) %
FMCG	29,581	(0.4) %	(2.0) %	Real Estate	267	0.1 %	0.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bandhan Ba	559	3.5 %	5.4 %	Indiabulls	610	(6.9) %	(28.0) %
Avenue Sup	1,342	3.4 %	(10.1) %	Piramal En	1,871	(6.5) %	(30.5) %
Shriram Tr	1,051	3.2 %	(15.0) %	HDFC AMC	1,809	(6.3) %	16.3 %
Shree Ceme	20,539	2.7 %	9.3 %	Yes Bank	109	(5.9) %	(60.4) %
Vedanta	168	2.5 %	(11.0) %	Cadila Hea	234	(3.7) %	(32.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (MAY)	19-06-2019	0:30	AUD	-	(0.0009)
Skilled Vacancies (MoM) (MAY)	19-06-2019	1:00	AUD	-	(0.016)
Consumer Price Index (MAY)	19-06-2019	12:30	CAD	-	136
Consumer Price Index (YoY) (MAY)	19-06-2019	12:30	CAD	-	0.02
Consumer Price Index Core (YoY) (MAY)	19-06-2019	12:30	CAD	-	0.018
Consumer Price Index n.s.a. (MoM) (MAY)	19-06-2019	12:30	CAD	-	0.004
CPI Core - Median (YoY) (MAY)	19-06-2019	12:30	CAD	-	0.019
CPI Core - Trim (YoY) (MAY)	19-06-2019	12:30	CAD	-	0.02
Teranet/National Bank HP Index (MAY)	19-06-2019	12:30	CAD	-	222.22
Teranet/National Bank HPI (MoM) (MAY)	19-06-2019	12:30	CAD	-	0
Teranet/National Bank HPI (YoY) (MAY)	19-06-2019	12:30	CAD	-	0.012
ECB President Draghi Gives Closing Remarks at Sintra Forum	19-06-2019	14:00	EUR	-	-
German Producer Price Index (MoM) (MAY)	19-06-2019	6:00	EUR	-	0.005
German Producer Price Index (YoY) (MAY)	19-06-2019	6:00	EUR	-	0.025
Euro-Zone Current Account s.a. (euros) (APR)	19-06-2019	8:00	EUR	-	-
European Commission President Juncker Speaks in Sintra	19-06-2019	8:30	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (APR)	19-06-2019	9:00	EUR	-	(0.003)
Euro-Zone Construction Output w.d.a. (YoY) (APR)	19-06-2019	9:00	EUR	-	0.063
CBI Trends Selling Prices (JUN)	19-06-2019	10:00	GBP	-	(1)
CBI Trends Total Orders (JUN)	19-06-2019	10:00	GBP	-	(10)
Consumer Price Index (MoM) (MAY)	19-06-2019	8:30	GBP	-	0.006
Consumer Price Index (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.021
Core Consumer Price Index (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.018
CPIH (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.02
House Price Index (YoY) (APR)	19-06-2019	8:30	GBP	-	0.014
Producer Price Index Input n.s.a. (MoM) (MAY)	19-06-2019	8:30	GBP	-	0.011
Producer Price Index Input n.s.a. (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.038
Producer Price Index Output Core n.s.a. (MoM) (MAY)	19-06-2019	8:30	GBP	-	0.002
Producer Price Index Output Core n.s.a. (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.002



Producer Price Index Output n.s.a. (MoM) (MAY)	19-06-2019	8:30	GBP	-	0.003
Producer Price Index Output n.s.a. (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.021
Retail Price Index (MAY)	19-06-2019	8:30	GBP	-	288.2
Retail Price Index (MoM) (MAY)	19-06-2019	8:30	GBP	-	0.011
Retail Price Index (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.03
Retail Price Index Ex Mort Int.Payments (YoY) (MAY)	19-06-2019	8:30	GBP	-	0.03
BOJ Outright Bond Purchase 10~25 Years	19-06-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	19-06-2019	1:10	JPY	-	-
Foreign Buying Japan Bonds (JUN 14)	19-06-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 14)	19-06-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 14)	19-06-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 14)	19-06-2019	23:50	JPY	-	-
BOJ Eto speaks in Tokyo	19-06-2019	6:36	JPY	-	-
Gross Domestic Product (YoY) (1Q)	19-06-2019	22:45	NZD	-	0.023
Gross Domestic Product s.a. (QoQ) (1Q)	19-06-2019	22:45	NZD	-	0.006
Non Resident Bond Holdings (MAY)	19-06-2019	3:00	NZD	-	0.539
MBA Mortgage Applications (JUN 14)	19-06-2019	11:00	USD	-	0.268
DOE Cushing OK Crude Inventory (JUN 14)	19-06-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 14)	19-06-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 14)	19-06-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 14)	19-06-2019	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (JUN 19)	19-06-2019	18:00	USD	-	0.0225
FOMC Rate Decision (Upper Bound) (JUN 19)	19-06-2019	18:00	USD	-	0.025
Interest Rate on Excess Reserves (JUN 20)	19-06-2019	18:00	USD	-	0.0235
Fed Chair Powell Holds Press Conference After FOMC Meeting	19-06-2019	18:30	USD	-	-

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