



19 Jul.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,000	0.2 %	7.7 %
BSE SENSEX	36,373	(0.4) %	9.6 %
CNX BANK	26,960	0.3 %	10.8 %
CNX MIDCAP	18,026	0.0 %	(5.6) %
CNX SMALLCAP	7,040	0.3 %	(11.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,199	0.3 %	1.5 %
S&P 500	2,816	0.2 %	4.4 %
FTSE 100	7,676	0.7 %	0.4 %
HANG SENG	28,117	(0.2) %	(7.9) %
NIKKEI	22,794	0.4 %	(3.0) %
SHANGHAI COMPOSITE	2,787	(0.4) %	(16.8) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	68.62	0.1 %	7.8 %
EUR/USD	1.16	(0.6) %	(3.1) %
GBP/USD	1.31	(1.3) %	(3.3) %
USD/JPY	112.72	0.3 %	0.0 %
USD/AUD	1.35	(0.2) %	5.3 %
USD/SGD	1.37	0.4 %	2.3 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	0.0 %	12.8 %
Gold(INR/10g)	29,729	(1.0) %	1.3 %
Gold Comex(USD/oz)	1,228	(1.1) %	(6.2) %
SILVER(INR/1Kg)	37,882	(1.7) %	(1.9) %
Aluminium(USD/MT)	2,110	(0.9) %	(6.5) %
Copper(USD/MT)	6,142	(0.0) %	(14.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

**Global Economy:** The Beige Book, a compilation of anecdotal evidence on economic conditions in the twelve Fed districts, said economic activity continued to expand across the US Ten of the twelve Fed districts reported moderate or modest growth, while the Dallas district reported strong growth due to strength in the energy sector and the St. Louis district described growth as slight. The Fed noted manufacturers across the country expressed concern about tariffs, with many districts citing new trade policies for higher prices and supply disruptions. The Beige Book noted employment continued to rise at a modest to moderate pace in most districts. It also said that prices increased at a modest to moderate pace on average, with several districts reporting upticks in inflation. The US Commerce Department said housing starts plunged by 12.3% to an annual rate of 1.173 million in June after jumping by 4.8% to a revised rate of 1.337 million in May.

**Global Equities:** US stocks saw moderate gains with the Standard and Poor 500 index testing its five month highs.

**Indian Economy:** There is no shortage of coal for the Power Sector, noted a latest update from the Ministry Of Coal. In the beginning of 2018-19, Coal India Limited (CIL) had a pithead stock of 55.55 Million Tonne (MT) and stock at Power House end was 16.27 MT. In the 1st Quarter of 2018-19, CIL dispatched a record quantity of 122.2 MT coal to Power Sector, thereby achieving a growth of 15% over the dispatch in the corresponding period of last year. The growth in dispatch of coal to Power Sector has helped coal based generation to achieve positive growth of 5.3% in the 1st Quarter of 2018-19.

**Equity Markets:** Key benchmark indices dropped in volatile trade as the opposition parties tabled a no-confidence motion against Prime Minister Narendra Modi's government. The Nifty settled below the psychologically important 11,000 mark after moving above and below that level in intraday trade. After opening higher, the market pared gains in mid-morning trade and hit fresh intraday low in mid-afternoon trade.

**Corporate News:** Sugar stocks would be in focus. Keeping in view the interest of sugarcane farmers, the Cabinet Committee on Economic Affairs chaired by Prime Minister Narendra Modi has approved the Fair and Remunerative Price (FRP) of sugarcane for sugar season 2018-19 at Rs. 275/- per quintal for a basic recovery rate of 10%; providing a premium of Rs. 2.75/qrt for each 0.1 % increase in recovery over and above 10%. The cost of production of sugarcane for the sugar season 2018-19 is Rs. 155 per quintal. As per the data, released by the Directorate General of Civil Aviation (DGCA) on Wednesday, Indian carriers carried 11.3 million passengers during the month, up from 9.6 million in June 2017, which is a traditionally strong month for airlines. Zydus Cadila said it has received final approvals from the US health regulator to market four generic products in America.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(85.7)	(28.6)	(41.2)
MF(INR cr)	(29.2)	329.5	474.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,712	30,333	32,581
F&O(INR cr)	1,196,439	815,772	833,480

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.1	13.7	15.0
NSE VIX	13.7	12.8	13.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,881	(0.5) %	10.5 %	Energy	14,363	0.3 %	8.1 %
IT	14,632	0.1 %	15.1 %	Pharma	8,886	(0.5) %	3.1 %
Metals	3,121	(3.2) %	(11.8) %	Finance	11,279	(0.1) %	9.9 %
Auto	10,809	(1.4) %	(2.3) %	PSU	2,776	(0.8) %	(2.8) %
FMCG	28,993	(1.0) %	9.4 %	Real Estate	254	(2.4) %	(14.2) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	1,200	4.1 %	(3.6) %	Ashok Leyl	111	(14.0) %	(25.4) %
Emami	550	4.0 %	0.8 %	Tata Steel	504	(5.3) %	(12.9) %
L&T Fin.Ho	152	2.9 %	(5.5) %	DLF	171	(5.1) %	(15.1) %
O N G C	160	2.7 %	(10.9) %	Rural Elec	91	(5.0) %	(28.9) %
B P C L	402	2.5 %	(5.0) %	Idea Cellu	50	(4.7) %	(35.7) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Employment Change (JUN)	19-07-2018	01:30	AUD	-	-
Full Time Employment Change (JUN)	19-07-2018	01:30	AUD	-	-
NAB Business Confidence (2Q)	19-07-2018	01:30	AUD	-	7
Part Time Employment Change (JUN)	19-07-2018	01:30	AUD	-	-
Participation Rate (JUN)	19-07-2018	01:30	AUD	-	0.655
RBA Foreign Exchange Transaction (Australian dollar) (JUN)	19-07-2018	01:30	AUD	-	-
RBA FX Transactions Government (JUN)	19-07-2018	01:30	AUD	-	-
RBA FX Transactions Other (JUN)	19-07-2018	01:30	AUD	-	-
Unemployment Rate (JUN)	19-07-2018	01:30	AUD	-	0.054
ADP Publishes June Payrolls Report	19-07-2018	12:30	CAD	-	-
Exports (MoM) (JUN)	19-07-2018	06:00	CHF	-	0
Imports (MoM) (JUN)	19-07-2018	06:00	CHF	-	0.031
Swiss Watch Exports (YoY) (JUN)	19-07-2018	06:00	CHF	-	0.053
Retail Sales Ex Auto Fuel (MoM) (JUN)	19-07-2018	08:30	GBP	-	0.013
Retail Sales Ex Auto Fuel (YoY) (JUN)	19-07-2018	08:30	GBP	-	0.044
Retail Sales Inc Auto Fuel (MoM) (JUN)	19-07-2018	08:30	GBP	-	0.013
Retail Sales Inc Auto Fuel (YoY) (JUN)	19-07-2018	08:30	GBP	-	0.039
BOJ Outright Bond Purchase 10~25 Years	19-07-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	19-07-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	19-07-2018	01:10	JPY	-	-
Machine Tool Orders (YoY) (JUN F)	19-07-2018	06:00	JPY	-	0.114
National Consumer Price Index (YoY) (JUN)	19-07-2018	23:30	JPY	-	0.007
National Consumer Price Index Ex-Fresh Food (YoY) (JUN)	19-07-2018	23:30	JPY	-	0.007
Natl CPI Ex Fresh Food, Energy (YoY) (JUN)	19-07-2018	23:30	JPY	-	0.003
Foreign Buying Japan Bonds (JUL 13)	19-07-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUL 13)	19-07-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 13)	19-07-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 13)	19-07-2018	23:50	JPY	-	-
Nat'l Mfg. Index (YoY) (JUN)	19-07-2018	23:45	USD	-	5.000



Continuing Claims (JUL 07)	19-07-2018	12:30	USD	-	-
Initial Jobless Claims (JUL 14)	19-07-2018	12:30	USD	-	-
Philadelphia Fed Business Outlook (JUL)	19-07-2018	12:30	USD	-	19.9
Fed's Quarles Speaks on Alternative Reference Rates	19-07-2018	13:00	USD	-	-
Leading Index (JUN)	19-07-2018	14:00	USD	-	0.002
EIA Natural Gas Storage Change (JUL 13)	19-07-2018	14:30	USD	-	51
EIA Working Natural Gas Implied Flow (JUL 13)	19-07-2018	14:30	USD	-	51
U.S. to Sell USD13 Bln 10-Year TIPS	19-07-2018	17:00	USD	-	-

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