



19 Aug.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,048	0.2 %	(5.3) %
BSE SENSEX	37,350	0.1 %	(3.9) %
CNX BANK	28,217	0.7 %	(7.0) %
CNX MIDCAP	15,817	0.3 %	(13.7) %
CNX SMALLCAP	5,466	0.3 %	(18.9) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,886	1.2 %	11.0 %
S&P 500	2,889	1.4 %	15.2 %
FTSE 100	7,117	0.7 %	5.7 %
HANG SENG	25,734	0.9 %	2.4 %
NIKKEI	20,419	0.1 %	4.4 %
SHANGHAI COMPOSITE	2,824	0.3 %	14.5 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.21	0.3 %	2.6 %
EUR/USD	1.11	(0.9) %	(3.1) %
GBP/USD	1.21	0.5 %	(4.8) %
USD/JPY	106.28	0.4 %	(3.1) %
USD/AUD	1.47	(0.1) %	3.8 %
USD/SGD	1.39	0.0 %	1.6 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(0.7) %	18.0 %
Gold(INR/10g)	37,466	(0.3) %	18.8 %
Gold Comex(USD/oz)	1,509	(0.9) %	16.9 %
SILVER(INR/1Kg)	43,624	0.1 %	14.0 %
Aluminium(USD/MT)	1,756	0.7 %	(5.5) %
Copper(USD/MT)	5,710	0.2 %	(2.2) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.0 %	(1.1) %

**Global Economy:** Consumer sentiment in the US has seen a significant deterioration in the month of August, according to a preliminary report released by the University of Michigan. The consumer sentiment index tumbled to 92.1 in August from a reading of 98.4 in July. The US housing starts fell by 4% to an annual rate of 1.191 million from the revised June estimate of 1.241 million. The decrease came as multi-family starts plunged by 16.2% to a rate of 315,000, more than offsetting a 1.3% increase in single-family starts to a rate of 876,000. The building permits, an indicator of future housing demand, surged by 8.4% to a rate of 1.336 million in July from a revised 1.232 million in June. Euro area trade surplus fell to a seasonally adjusted EUR 17.9 billion in June from EUR 19.6 billion in May, as exports logged a monthly decline amid an increase in imports, data from Eurostat showed. In the same period last year, the surplus totaled EUR 12.5 billion. On a monthly basis, exports decreased 0.6% on month, while imports grew 0.3%.

**Global Equities:** Some optimism emerged in global stocks on hopes that global central banks would provide aggressive stimulus in order to prevent a global recession. The Dow spiked 1.2%, cutting back some of the lost ground after testing two month low earlier in the week.

**Indian Economy:** Indian Meteorological Department (IMD), stated in a latest update that the weekly rainfall averaged over the country as a whole was 45% above the Long Period Average(LPA) in 8th-14th August 2019, mainly owing to the large quantum of rainfall received over central India and south peninsular India. Cumulatively, 84% of the area of the country received above normal rainfall and rest 16 % area received deficient rainfall, so far (1st June -14th August 2019) during the current monsoon season. For the country as a whole, cumulative rainfall of southwest Monsoon season upto 14th August has been +01% above LPA.

**Equity Markets:** Key equity benchmarks ended marginally higher, rising for the second straight day. Steep gains were capped amid worries about slowing economic growth and ongoing Sino-US trade tensions. Firmness in auto and banks shares was nullified by weakness in IT and pharma stocks. The barometer index, the S&P BSE Sensex, rose 38.80 points or 0.1% to 37,350.33. The Nifty 50 index rose 18.4 points or 0.17% to 11,047.80.

**Corporate News:** Reliance Industries would be in focus. Fitch Ratings on Friday raised the outlook on Reliance Industries (RIL) to positive from stable due to the company's potential to further deleverage following its announcement to eliminate its net debt by March 2021. NMDC announced no change in its iron ore prices for August month and reported a 37% annual jump in production to 1.95 million tonne in July 2019. NMDC has kept the prices of lump ore and fines unchanged at Rs 3,100 per tonne and Rs 2,860 per tonne, respectively. TVS Motor (Singapore), a wholly-owned subsidiary of TVS Motor Company, has signed definitive agreements to invest US\$ 3.2 million in Predictronics Corporation, a US corporation, headquartered in Cincinnati, Ohio.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(78.6)	(195.6)	10.9
MF(INR cr)	93,566.0	93,566.0	1,374.4

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,172	37,276	34,409
F&O(INR cr)	829,535	1,568,871	1,270,471

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	18.5	19.4	15.2
NSE VIX	16.7	16.2	17.8

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	28,217	0.7 %	(7.0) %	Energy	14,595	0.2 %	(11.7) %
IT	15,365	(0.7) %	(3.0) %	Pharma	7,684	(0.8) %	(18.0) %
Metals	2,402	(0.4) %	(22.6) %	Finance	12,544	0.3 %	0.4 %
Auto	6,998	1.1 %	(16.8) %	PSU	2,604	1.5 %	(23.1) %
FMCG	28,890	0.2 %	(4.3) %	Real Estate	265	0.3 %	(0.8) %

### 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>
Vodafone I	6	14.2 %	(63.7) %	General In	183	(5.2) %	(25.5) %
HDFC Life	540	4.5 %	40.7 %	United Bre	1,339	(2.6) %	(5.3) %
UPL	549	4.1 %	(11.9) %	S A I L	36	(2.2) %	(34.2) %
Yes Bank	79	3.8 %	(71.2) %	Biocon	228	(1.9) %	(26.4) %
Oracle Fin	3,078	3.1 %	(9.2) %	TCS	2,165	(1.8) %	6.6 %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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