



19 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,313	0.3 %	10.8 %
BSE SENSEX	37,291	(0.8) %	12.4 %
CNX BANK	26,486	0.2 %	8.9 %
CNX MIDCAP	19,055	0.3 %	(0.2) %
CNX SMALLCAP	7,272	0.3 %	(8.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,247	0.7 %	5.7 %
S&P 500	2,904	0.5 %	7.7 %
FTSE 100	7,300	(0.0) %	(4.5) %
HANG SENG	27,085	0.6 %	(11.2) %
NIKKEI	23,421	1.4 %	(0.4) %
SHANGHAI COMPOSITE	2,700	1.8 %	(19.4) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.97	1.6 %	14.6 %
EUR/USD	1.17	0.3 %	(2.9) %
GBP/USD	1.31	0.6 %	(2.7) %
USD/JPY	112.32	0.2 %	(0.4) %
USD/AUD	1.38	(1.1) %	8.2 %
USD/SGD	1.37	(0.3) %	2.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	1.4 %	15.7 %
Gold(INR/10g)	30,737	0.4 %	4.7 %
Gold Comex(USD/oz)	1,205	0.1 %	(7.9) %
SILVER(INR/1Kg)	36,914	0.6 %	(4.4) %
Aluminium(USD/MT)	2,012	1.4 %	(10.8) %
Copper(USD/MT)	6,003	2.4 %	(16.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.1 %	0.6 %

Global Economy: Growth in global industrial production had been robust, particularly in the United States, euro area and smaller east Asian economies (that is, excluding Japan and China), according to the members of the Reserve Bank Of Australia (RBA), monetary policy committee. The UK economy is projected to grow by about 1.50% this year and next, down from about 1.75% in 2016 and 2017, according to a latest update from the International Monetary Fund (IMF). The fund noted that Brexit-related effects are the driving factor for the slowdown in growth since the referendum.

Global Equities: Investors tried to shrug off the persistent global trade concerns. However, markets were rather nervous after US President Donald Trump imposed 10% tariffs on an additional \$200 billion worth of Chinese imports, and warned of duties on more products if China took retaliatory action.

Indian Economy: Compared to December 2017, the real effective depreciation of the Indian rupee is between 6% and 7%, according to an IMF estimate. Broadly since the beginning of the year, the Indian rupee has lost about 11% of its value in nominal terms vis-a-vis the US dollar, stated IMF spokesperson Gerry Rice, according to media reports. Observing that India is a relatively closed economy, he said the contribution of the net exports to growth in the April to June quarter was again stronger than expected and the real depreciation of the rupee can be expected to reinforce this trend.

Equity Markets: Local stocks tumbled on across the board selling pressure in global equities. Banking stocks took a hit and the SENSEX extended losses under 38000 levels. Domestic shares spent most of the trading session in negative territory and the selling pressure intensified in the last hour of trade. The Rupee extended its losing streak and tested fresh lows very close to 73 per US dollar mark. The INR eased even as the dollar stayed slippery in global currency markets.

Corporate News: Strides Pharma Science announced that the formulations facility in Bangalore recently underwent pre- approval product inspection by the USFDA. The inspection ended on August 25, 2018 and the company has been issued a Form 483 with 3 observations. Reliance Capital chairman Anil Ambani Tuesday said the company is aiming to reduce its debt by exiting all the non-financial businesses in its portfolio in the next 12-18 months. Sharp gains in Copper and other metals after recent correction could keep domestic metal counters supported today. IT firms could see continued support as the Indian Rupee has approached 73 per US dollar mark- falling nearly 10% this fiscal year.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	13.2	(8.0)	(25.3)
MF(INR cr)	134.5	455.7	372.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,186	37,711	34,153
F&O(INR cr)	1,240,622	1,165,579	918,691

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.8	13.4	14.2
NSE VIX	14.4	14.2	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,441	(1.4) %	8.7 %	Energy	15,460	(1.0) %	16.3 %
IT	16,031	(0.6) %	26.2 %	Pharma	10,465	(0.4) %	21.4 %
Metals	3,648	(1.5) %	3.1 %	Finance	11,066	(1.4) %	7.8 %
Auto	10,566	(1.5) %	(4.5) %	PSU	2,890	(5.4) %	1.2 %
FMCG	30,893	1.1 %	16.6 %	Real Estate	261	(3.0) %	(12.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Hind. Unil	1,665	3.7 %	23.2 %	Bank of Ba	113	(16.4) %	(20.3) %
General In	355	2.0 %	(4.1) %	Oracle Fin	4,260	(5.1) %	8.2 %
Dabur Indi	470	1.9 %	40.0 %	DLF	203	(4.9) %	0.9 %
Yes Bank	324	1.6 %	5.6 %	Punjab Nat	79	(4.5) %	(17.7) %
O N G C	174	1.3 %	(3.4) %	St Bk of I	274	(4.0) %	11.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (AUG)	19-09-2018	0:30	AUD	-	0
Skilled Vacancies (MoM) (AUG)	19-09-2018	1:00	AUD	-	0.002
RBA's Kent Speech in Sydney	19-09-2018	1:30	AUD	-	-
SECO September 2018 Economic Forecasts	19-09-2018	5:45	CHF	-	-
ECB's Draghi speaks in Berlin	19-09-2018	13:00	EUR	-	-
EU 27 New Car Registrations (AUG)	19-09-2018	6:00	EUR	-	0.052
Euro-Zone Current Account s.a. (euros) (JUL)	19-09-2018	8:00	EUR	-	-
Euro-Zone Construction Output s.a. (MoM) (JUL)	19-09-2018	9:00	EUR	-	0.002
Euro-Zone Construction Output w.d.a. (YoY) (JUL)	19-09-2018	9:00	EUR	-	0.026
BOE's Haldane Speaks in Estonia	19-09-2018	8:00	GBP	-	-
Consumer Price Index (MoM) (AUG)	19-09-2018	8:30	GBP	-	0
Consumer Price Index (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.025
Consumer Price IndexH (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.023
Core Consumer Price Index (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.019
House Price Index (YoY) (JUL)	19-09-2018	8:30	GBP	-	0.03
Producer Price Index Input n.s.a. (MoM) (AUG)	19-09-2018	8:30	GBP	-	0.005
Producer Price Index Input n.s.a. (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.109
Producer Price Index Output Core n.s.a. (MoM) (AUG)	19-09-2018	8:30	GBP	-	0
Producer Price Index Output Core n.s.a. (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.022
Producer Price Index Output n.s.a. (MoM) (AUG)	19-09-2018	8:30	GBP	-	0
Producer Price Index Output n.s.a. (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.031
Retail Price Index (AUG)	19-09-2018	8:30	GBP	-	281.7
Retail Price Index (MoM) (AUG)	19-09-2018	8:30	GBP	-	0.001
Retail Price Index (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.032
Retail Price Index Ex Mort Int.Payments (YoY) (AUG)	19-09-2018	8:30	GBP	-	0.033
BOJ 2Q Money Flow	19-09-2018	23:50	JPY	-	-
Gross Domestic Product (YoY) (2Q)	19-09-2018	22:45	NZD	-	0.027
Gross Domestic Product s.a. (QoQ) (2Q)	19-09-2018	22:45	NZD	-	0.005
NBA Market Analysis (SEP 14)	19-09-2018	11:00	USD	-	-



Building Permits (AUG)	19-09-2018	12:30	USD	-	-
Building Permits (MoM) (AUG)	19-09-2018	12:30	USD	-	0.015
Current Account Balance (2Q)	19-09-2018	12:30	USD	-	-
Housing Starts (AUG)	19-09-2018	12:30	USD	-	-
Housing Starts (MoM) (AUG)	19-09-2018	12:30	USD	-	0.009
DOE Cushing OK Crude Inventory (SEP 14)	19-09-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 14)	19-09-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (SEP 14)	19-09-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (SEP 14)	19-09-2018	14:30	USD	-	-

..... End of Report

