



20 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,730	0.2 %	5.1 %
BSE SENSEX	35,287	(0.7) %	6.3 %
CNX BANK	26,357	0.3 %	8.3 %
CNX MIDCAP	18,522	0.0 %	(3.0) %
CNX SMALLCAP	7,455	0.0 %	(6.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,700	(1.2) %	(0.5) %
S&P 500	2,763	(0.4) %	2.5 %
FTSE 100	7,604	(0.4) %	(0.6) %
HANG SENG	29,468	(2.8) %	(3.4) %
NIKKEI	22,278	(1.8) %	(5.2) %
SHANGHAI COMPOSITE	2,908	(3.8) %	(13.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.38	0.6 %	7.4 %
EUR/USD	1.16	(0.5) %	(3.6) %
GBP/USD	1.32	(0.8) %	(2.6) %
USD/JPY	110.06	(0.0) %	(2.4) %
USD/AUD	1.35	0.4 %	5.8 %
USD/SGD	1.36	0.4 %	1.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	1.2 %	9.1 %
Gold(INR/10g)	30,757	0.2 %	4.8 %
Gold Comex(USD/oz)	1,286	0.3 %	(1.7) %
SILVER(INR/1Kg)	39,686	(1.2) %	2.8 %
Aluminium(USD/MT)	2,221	(0.8) %	(1.6) %
Copper(USD/MT)	6,987	(2.1) %	(2.7) %

FIXED INCOME

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

Global Economy: German economy is forecast to expand at slower pace this year and next as global economic risks increased significantly. In the Summer Forecast, the think tank projected the economy to expand 1.8% each this year and next. Earlier, the IFO had forecast 2.6% growth for 2018 and 2.1% in 2019. The agency said economic capacity shortages will persist over the forecasting period, accompanied by a consolidation in both wage and price increases. Eurozone construction output increased in April, after falling in the previous three months. Construction output advanced 1.8% month-over-month in April, reversing a revised 0.2% drop in March. This was the sharpest rate of growth since February 2017. European Central Bank President Mario Draghi said the central bank will remain patient in determining the timing of the first rate rise and will take a gradual approach to adjusting policy thereafter.

Global Equities: Stocks extended losses amid continued worries over global trade and a hefty slide in commodities like Crude oil and Copper.

Indian Economy: The all-important Madden-Julian Oscillation (MJO) wave is forecast to redevelop 'in the coming days' between tropical Africa and Central Indian Ocean. This may re-invigorate the Indian monsoon, according to the Australian Bureau of Meteorology, a widely respected MJO tracker. The MJO wave passes periodically from West to East over the Indian Ocean and is loaded with significant implications for weather under its footprint. The Arabian Sea and the Bay of Bengal, which lie just North of the Indian Ocean, are also impacted in the bargain, which in turn determines the performance of the Indian monsoon.

Equity Markets: Local stocks extended losses on weak global cues as the trade spat between the US and China intensified. The barometer index, the S&P BSE Sensex, fell 261.52 points or 0.74% to 35286.74, as per the provisional closing data. The Nifty 50 index fell 89.40 points or 0.83% to 10,710.45, as per the provisional closing data. Unabated capital outflows by foreign funds too dampened sentiment. The market opened almost flat and turned weak as the session progressed. Indices hit fresh intraday low in afternoon trade. Market pared losses in mid-afternoon trade as bargain hunting emerged at lower levels. Indices hit fresh intraday low in late trade as selling picked up pace yet again.

Corporate News: Metal and mining counters are expected to stay under continued stress on the weak global Copper prices. Glenmark the US health regulator has approved the first product from its Monroe, North Carolina based manufacturing facility. The US Food and Drug Administration (USFDA) has provided its first supplemental Abbreviated New Drug Application (ANDA) approval for the company's plant in Monroe, Glenmark said in a statement.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(59.8)	(28.8)	(50.1)
MF(INR cr)	421.4	290.7	477.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,920	29,268	33,363
F&O(INR cr)	667,241	762,216	801,270

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.4	15.3
NSE VIX	12.9	12.8	13.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,266	(0.5) %	8.0 %	Energy	13,821	(1.5) %	4.0 %
IT	13,849	(1.2) %	9.0 %	Pharma	9,254	(0.7) %	7.3 %
Metals	3,426	(1.6) %	(3.2) %	Finance	10,929	(0.3) %	6.5 %
Auto	11,080	(1.1) %	0.2 %	PSU	2,975	(1.6) %	4.2 %
FMCG	28,652	(0.2) %	8.1 %	Real Estate	281	(2.0) %	(5.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Container	1,268	2.9 %	2.2 %	SAIL	83	(4.3) %	13.9 %
Motherson	309	2.3 %	(4.4) %	NMDC	108	(3.6) %	(8.4) %
Cadila Hea	409	2.1 %	6.2 %	Vedanta	224	(3.4) %	(20.5) %
GAIL (Indi	343	1.4 %	5.5 %	IOCL	169	(3.0) %	(1.1) %
Bajaj Fin.	2,271	1.2 %	24.9 %	HPC L	313	(2.8) %	(9.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (MAY)	20-06-2018	0:30	AUD	-	0.002
Skilled Vacancies (MoM) (MAY)	20-06-2018	1:00	AUD	-	(0.005)
ECB's Coeure is chairing a panel in Sintra, Portugal	20-06-2018	10:30	EUR	-	-
Draghi, Powell, Kuroda and Lowe speak in Sintra, Portugal	20-06-2018	13:30	EUR	-	-
German Producer Price Index (MoM) (MAY)	20-06-2018	6:00	EUR	-	0.005
German Producer Price Index (YoY) (MAY)	20-06-2018	6:00	EUR	-	0.02
ECB's Lautenschlager chairs panel in Sintra	20-06-2018	8:00	EUR	-	-
CBI Trends Selling Prices (JUN)	20-06-2018	10:00	GBP	-	19
CBI Trends Total Orders (JUN)	20-06-2018	10:00	GBP	-	(3)
BOJ Outright Bond Purchase 10~25 Years	20-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	20-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	20-06-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (JUN 15)	20-06-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 15)	20-06-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 15)	20-06-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 15)	20-06-2018	23:50	JPY	-	-
Convenience Store Sales (YoY) (MAY)	20-06-2018	7:00	JPY	-	0.007
Gross Domestic Product (YoY) (1Q)	20-06-2018	22:45	NZD	-	0.029
Gross Domestic Product s.a. (QoQ) (1Q)	20-06-2018	22:45	NZD	-	0.006
MBA Mortgage Applications (JUN 15)	20-06-2018	11:00	USD	-	(0.015)
Current Account Balance (1Q)	20-06-2018	12:30	USD	-	-
Existing Home Sales (MAY)	20-06-2018	14:00	USD	-	-
Existing Home Sales (MoM) (MAY)	20-06-2018	14:00	USD	-	(0.025)
DOE Cushing OK Crude Inventory (JUN 15)	20-06-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 15)	20-06-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 15)	20-06-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 15)	20-06-2018	14:30	USD	-	-

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