



20 Jul.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,004	0.4 %	7.8 %
BSE SENSEX	36,351	(0.1) %	9.7 %
CNX BANK	26,820	0.1 %	10.2 %
CNX MIDCAP	17,954	0.4 %	(6.0) %
CNX SMALLCAP	6,988	0.2 %	(11.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,065	(0.5) %	1.0 %
S&P 500	2,804	(0.4) %	4.0 %
FTSE 100	7,684	0.1 %	0.5 %
HANG SENG	28,011	(0.4) %	(8.2) %
NIKKEI	22,765	(0.1) %	(3.2) %
SHANGHAI COMPOSITE	2,773	(0.5) %	(17.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.05	0.6 %	8.4 %
EUR/USD	1.16	0.0 %	(3.1) %
GBP/USD	1.30	(0.4) %	(3.7) %
USD/JPY	112.42	(0.3) %	(0.3) %
USD/AUD	1.36	1.1 %	6.4 %
USD/SGD	1.37	0.4 %	2.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	1.0 %	15.1 %
Gold(INR/10g)	29,742	0.0 %	1.3 %
Gold Comex(USD/oz)	1,218	(0.6) %	(6.9) %
SILVER(INR/1Kg)	37,653	(0.6) %	(2.5) %
Aluminium(USD/MT)	2,062	1.1 %	(8.6) %
Copper(USD/MT)	5,982	(1.4) %	(16.7) %

FIXED INCOME

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

Global Economy: Indicating continuing solid growth in the U.S. economy, the Conference Board released a report on Thursday showing a bigger than expected increase by its index of leading economic indicators in the month of June. The Conference Board said its leading economic index climbed by 0.5% in June after revised data showed no change in May. The index had reported 0.2% rise for the previous month earlier. UK retail sales unexpectedly declined in June, but the quarterly growth rate was the fastest since 2015, preliminary data from the Office for National Statistics showed. Retail sales dropped 0.5% from the previous month.

Global Equities: US stocks moved mostly lower during trading on Thursday, giving back some ground after recent show of strength.

Indian Economy: The Asian Development Bank (ADB) reported that growth in Asia and the Pacific's developing economies for 2018 and 2019 will remain solid as growth continues apace across the region, despite rising tensions between the United States and its trading partners. In a supplement to its Asian Development Outlook (ADO) 2018 report released last April, ADB forecasts 2018 growth for Asia and the Pacific at 6.0% for 2018 and 5.9% for 2019, in line with its previous projections. Excluding Asia's newly industrialized economies, growth is forecast at 6.5% in 2018 and 6.4% in 2019, also unchanged from April.

Equity Markets: Local stocks ended with small losses after a volatile session of trade. The barometer index, the S&P BSE Sensex, fell 22.21 points or 0.06% to settle at 36,351.23. The Nifty 50 index fell 23.35 points or 0.21% to settle at 10,957.10. Gains triggered by index heavyweights Reliance Industries and ITC were almost offset by slide in Kotak Mahindra Bank, L&T and HDFC. Investors were cautious ahead of a no-confidence motion against the government.

Corporate News: ABB India's consolidated net profit rose 36.09% to Rs 102.15 crore on 20.76% rise in total income to Rs 2736.28 crore in Q2 June 2018 over Q2 June 2017. Bajaj Finserv's consolidated net profit rose 49.38% to Rs 1328.52 crore on 16.4% rise in total income to Rs 8771.21 crore in Q1 June 2018 over Q1 June 2017. The announcement was made after market hours yesterday, 19 July 2018. Alembic Pharmaceuticals said that the company has received Establishment Inspection Report (EIR) from United States Food and Drug Administration (US FDA) for the inspection carried out by them at our API Facility at Karakhadi during the period from 14 May 2018 to 18 May 2018. With this, all manufacturing facilities for international markets are FDA compliant. Wipro and Bajaj Auto among others will announce April-June 2018 earnings today, 20 July 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(0.3)	(26.4)	(40.6)
MF(INR cr)	(29.2)	329.5	474.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,561	30,349	32,555
F&O(INR cr)	1,820,234	972,979	861,470

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	13.6	15.0
NSE VIX	13.6	12.8	13.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,790	(0.3) %	10.1 %	Energy	14,431	0.5 %	8.6 %
IT	14,490	(1.0) %	14.0 %	Pharma	8,750	(1.5) %	1.5 %
Metals	3,105	(0.5) %	(12.3) %	Finance	11,209	(0.6) %	9.2 %
Auto	10,799	(0.1) %	(2.3) %	PSU	2,790	0.5 %	(2.3) %
FMCG	29,213	0.8 %	10.2 %	Real Estate	254	(0.2) %	(14.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Titan Comp	870	2.8 %	(7.9) %	Hindalco I	198	(7.0) %	(6.5) %
JSW Steel	304	2.5 %	2.4 %	Bharti Inf	285	(4.7) %	(15.5) %
Bharti Air	345	2.4 %	(12.7) %	Shriram Tr	1,183	(4.5) %	(19.5) %
Yes Bank	392	2.3 %	28.1 %	Ashok Leyl	106	(4.4) %	(28.6) %
Vedanta	208	2.2 %	(26.2) %	Kotak Mah.	1,347	(3.7) %	22.9 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (JUN)	20-07-2018	12:30	CAD	-	133.4
Consumer Price Index (YoY) (JUN)	20-07-2018	12:30	CAD	-	0.022
Consumer Price Index Core (YoY) (JUN)	20-07-2018	12:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (JUN)	20-07-2018	12:30	CAD	-	0.001
CPI Core - Median (YoY) (JUN)	20-07-2018	12:30	CAD	-	0.019
CPI Core - Trim (YoY) (JUN)	20-07-2018	12:30	CAD	-	0.019
Retail Sales (MoM) (MAY)	20-07-2018	12:30	CAD	-	(0.012)
Retail Sales Ex Auto (MoM) (MAY)	20-07-2018	12:30	CAD	-	(0.001)
German Producer Price Index (MoM) (JUN)	20-07-2018	06:00	EUR	-	0.005
German Producer Price Index (YoY) (JUN)	20-07-2018	06:00	EUR	-	0.027
Euro-Zone Current Account n.s.a. (euros) (MAY)	20-07-2018	08:00	EUR	-	-
Euro-Zone Current Account s.a. (euros) (MAY)	20-07-2018	08:00	EUR	-	-
Central Government NCR (JUN)	20-07-2018	08:30	GBP	-	-
PSNB ex Banking Groups (JUN)	20-07-2018	08:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (JUN)	20-07-2018	08:30	GBP	-	-
Public Sector Net Borrowing (JUN)	20-07-2018	08:30	GBP	-	-
All Industry Activity Index (MoM) (MAY)	20-07-2018	04:30	JPY	-	0.01
Credit Card Spending (MoM) (JUN)	20-07-2018	03:00	NZD	-	(0.016)
Credit Card Spending (YoY) (JUN)	20-07-2018	03:00	NZD	-	0.037
Fed's Bullard Speaks on Economy and Monetary Policy	20-07-2018	12:00	USD	-	-
Baker Hughes U.S. Rig Count (JUL 20)	20-07-2018	17:00	USD	-	1054

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