



20 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,054	0.0 %	(5.3) %
BSE SENSEX	37,402	0.1 %	(3.8) %
CNX BANK	28,186	0.0 %	(7.1) %
CNX MIDCAP	15,864	0.0 %	(13.5) %
CNX SMALLCAP	5,491	0.0 %	(18.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,136	1.0 %	12.0 %
S&P 500	2,924	1.2 %	16.6 %
FTSE 100	7,190	1.0 %	6.8 %
HANG SENG	26,292	2.2 %	4.6 %
NIKKEI	20,563	0.7 %	5.1 %
SHANGHAI COMPOSITE	2,883	2.1 %	16.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.16	0.2 %	2.5 %
EUR/USD	1.11	(0.9) %	(3.2) %
GBP/USD	1.21	0.6 %	(4.8) %
USD/JPY	106.40	0.5 %	(2.9) %
USD/AUD	1.48	0.0 %	3.9 %
USD/SGD	1.39	(0.1) %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	2.1 %	20.5 %
Gold(INR/10g)	37,469	0.0 %	18.8 %
Gold Comex(USD/oz)	1,498	(0.7) %	16.0 %
SILVER(INR/1Kg)	43,242	(0.9) %	13.0 %
Aluminium(USD/MT)	1,763	0.4 %	(5.1) %
Copper(USD/MT)	5,756	0.8 %	(1.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	0.1 %	(1.0) %

Global Economy: People's Bank of China said it would use market-based reform methods to help lower real lending rates and prop up a slowing economy. Eurozone headline inflation slowed to 1% in July from 1.3% in June, final data from Eurostat showed Monday. This was the lowest since November 2016. UK households' assessment of their financial well-being fell in August, survey data from the IHS Markit showed. The IHS Markit Household Finance Index, or HFI, fell to 43.7 in August from 44.3 in July. Japan merchandise trade deficit came in at 249.6 billion yen in July, the Ministry of Finance said on Monday, following the 589.5 billion yen deficit in June. Japan's exports were down 1.6% on year, following the upwardly revised 6.6% drop in the previous month (originally -6.7%) while imports dipped an annual 1.2% following the 5.2% fall a month earlier.

Global Equities: Global equities edged up in quite trades on Monday. Bond yields rose in euro zone after plummeting to record low. DOW soared 1%. Traders focused on prospect of fiscal stimulus in Germany. Shanghai Composite index jumped 2%.

Indian Economy: Automobile dealers' body FADA stated in a monthly update that the retail sales of passenger vehicles (PV) in July dropped by 11% to 2,43,183 units against the same period last year. FADA noted that some hope is building up for the Festive Season with Monsoon Revival. Improving liquidity and serious intervention and action expected from government could lead to demand improvement for local auto sector according to FADA. According to data released by the Agriculture Ministry, the total sown area of kharif crops stood at 926 lakh hectares (lh) as on 16th August 2019 compared to 966 lh covered in the corresponding week last year, recording a slide of 4.14% on year. India's private equity and venture capital investments surged above \$8 billion in July recording the highest fund infusion in a month by PE/VC funds, noted EY's private equity deal tracker, according to media reports. EY's private equity deal tracker stated that July 2019 recorded investments worth \$8.3 billion across 106 deals against \$1.8 billion in July 2018 through 70 deals. India's foreign exchange reserves jumped by US\$ 1.62 billion to US\$ 430.57 billion in the week ended 09 August 2019.

Equity Markets: Key equity benchmarks wiped off majority of the gains in last hour of session and ended marginally higher. Gains in pharma stocks were negated by weakness in auto stocks. Nifty struggled to hold the 11,100-mark and ended below that level. S&P BSE Sensex rose 52.16 points or 0.14% to 37,402.49 and the Nifty 50 index rose 6.10 points or 0.06% to 11,053.90. Investors remained skeptical after recent losses in the markets.

Corporate News: Nestle announce the launch of the world's no 1 cocoa-malt beverage - MILO in India. This launch further expands the MILO brand in India noted the company. Shares of Sterling & Wilson Solar will debut on the bourses today, 20 August 2019. The initial public offer (IPO) of Sterling & Wilson Solar received bids for 1.89 crore shares, as per the National Stock Exchange of India (NSE) website data. The issue was subscribed 0.85 times. The issue opened for subscription on 6 August 2019 and closed on 8 August 2019. The price band for the issue was Rs 775 to Rs 780 per share. Tata Motors said that long term rating of the company has been downgraded to CARE AA- / Negative from CARE AA/Stable due to weak performance of JLR. The announcement was made after market hours yesterday, 19 August 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	185.0	(109.5)	15.7
MF(INR cr)	1,111.0	1,041.4	347.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	27,185	36,358	34,332
F&O(INR cr)	873,915	1,505,693	1,266,252

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.9	19.1	15.3
NSE VIX	16.8	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	28,186	(0.1) %	(7.1) %	Energy	14,593	(0.0) %	(11.7) %
IT	15,415	0.3 %	(2.7) %	Pharma	7,741	0.7 %	(17.4) %
Metals	2,391	(0.4) %	(22.9) %	Finance	12,532	(0.1) %	0.3 %
Auto	6,959	(0.6) %	(17.3) %	PSU	2,582	(0.8) %	(23.7) %
FMCG	28,838	(0.2) %	(4.5) %	Real Estate	267	0.6 %	(0.2) %

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>
Sun Pharma	426	2.7 %	(11.0) %	Vodafone I	6	(7.0) %	(66.2) %
Bharti Inf	255	2.4 %	(18.8) %	Biocon	216	(5.2) %	(30.2) %
Havells In	664	1.9 %	(14.4) %	Yes Bank	77	(3.5) %	(72.2) %
SBI Life I	850	1.7 %	42.1 %	HDFC Life	525	(2.9) %	36.7 %
Tech Mahin	670	1.7 %	(14.7) %	Grasim Ind	732	(2.6) %	(14.6) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
RBA Minutes of August Policy Meeting (AUG)	20-08-2019	1:30	AUD	-	-
Manufacturing Sales (MoM) (JUN)	20-08-2019	12:30	CAD	-	0.016
Teranet/National Bank HP Index (JUL)	20-08-2019	12:30	CAD	-	224.96
Teranet/National Bank HPI (MoM) (JUL)	20-08-2019	12:30	CAD	-	0.008
Teranet/National Bank HPI (YoY) (JUL)	20-08-2019	12:30	CAD	-	0.005
Exports (MoM) (JUL)	20-08-2019	6:00	CHF	-	(0.001)
Imports (MoM) (JUL)	20-08-2019	6:00	CHF	-	0.014
Swiss Watch Exports (YoY) (JUL)	20-08-2019	6:00	CHF	-	(0.107)
German Producer Price Index (MoM) (JUL)	20-08-2019	6:00	EUR	-	(0.004)
German Producer Price Index (YoY) (JUL)	20-08-2019	6:00	EUR	-	0.012
Euro-Zone Construction Output s.a. (MoM) (JUN)	20-08-2019	9:00	EUR	-	(0.003)
Euro-Zone Construction Output w.d.a. (YoY) (JUN)	20-08-2019	9:00	EUR	-	0.02
CBI Trends Selling Prices (AUG)	20-08-2019	10:00	GBP	-	12
CBI Trends Total Orders (AUG)	20-08-2019	10:00	GBP	-	(34)
Convenience Store Sales (YoY) (JUL)	20-08-2019	7:00	JPY	-	0
Fed's Quarles Discusses Community Development	20-08-2019	22:00	USD	-	-

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