



20 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,234	(0.4) %	10.0 %
BSE SENSEX	37,121	(0.5) %	11.6 %
CNX BANK	26,277	(0.6) %	8.0 %
CNX MIDCAP	18,817	(0.9) %	(1.5) %
CNX SMALLCAP	7,167	(1.1) %	(9.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,406	0.6 %	6.4 %
S&P 500	2,908	0.1 %	7.9 %
FTSE 100	7,331	0.4 %	(4.1) %
HANG SENG	27,407	1.2 %	(10.2) %
NIKKEI	23,673	1.1 %	0.7 %
SHANGHAI COMPOSITE	2,731	1.1 %	(18.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.38	(0.2) %	13.7 %
EUR/USD	1.17	0.0 %	(2.7) %
GBP/USD	1.31	0.0 %	(2.7) %
USD/JPY	112.15	0.3 %	(0.5) %
USD/AUD	1.38	(1.3) %	7.7 %
USD/SGD	1.37	(0.3) %	2.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	1.4 %	15.7 %
Gold(INR/10g)	30,722	(0.0) %	4.6 %
Gold Comex(USD/oz)	1,205	0.1 %	(7.9) %
SILVER(INR/1Kg)	36,689	(0.6) %	(5.0) %
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:** The Commerce Department said housing starts spiked by 9.2% to an annual rate of 1.282 million in August from the revised July estimate of 1.174 million. Single-family starts also showed a notable increase, spurting by 1.9% to a rate of 876,000 in August from 860,000 in July. Meanwhile, the report said building permits tumbled by 5.7% to an annual rate of 1.229 million in August from a revised 1.303 million in July. Europe's passenger car registrations increased at faster rates in July and August, the European Automobile Manufacturers' Association reported Wednesday. Passenger car sales increased 10.5% year-on-year in July after expanding 5.2% in June. In August also, the EU passenger car market sales jumped by 31.2%. During January to August, passenger car registrations in the EU jumped 6.1% to reach 10.8 million units, largely boosted by the unusually strong performance during the summer months.

**Global Equities:** DOW soared near seven month top as investors appeared to brush off escalating trade tensions between the US and China.

**Indian Economy:** India has set a foodgrain target of 285.2 million tonnes (mt) for 2018-19, which is marginally higher than the expected production in 2017-18, the agriculture ministry said according to media reports. As per the fourth advance estimates released The pulses production targeted for 2018-19 is 25 mt, while oilseeds output in sight is 36 mt, nearly 15% more than the expected production of 31.31 mt in 2017-18 by the Government last month. The foodgrain harvest in 2017-18 would be around 284.83 mt on record production in staple as well as other mainline crops. While 2018-19 rice production target is 113 mt as against 112.91 mt for the previous year, wheat yield is set at 100 mt, slightly higher than 99.7 mt expected in 2017-18.

**Equity Markets:** Equity benchmarks extended losses. Markets gave up early gains and ended lower, extending losses for third straight day. Selling in major sectors such as banks and FMCG weighed on the indices. The rupee hovering near its record low also spooked investors.

**Corporate News:** Yes Bank announced that the Reserve Bank of India has intimated that Rana Kapoor may continue as the MD&CEO till 31 January 2019, and the Board of Directors of the Bank are scheduled to meet on 25 September 2018 to decide on the future course of action. Great Eastern Shipping Company took delivery of a second hand Very Large Gas Carrier "Jag Vasant" of about 83,270 cbm. The Company had contracted to buy the vessel in Q2 FY 19. Bajaj Hindusthan Sugar announced that Competition Commission of India (CCI) has vide its order dated 18 September 2018, has passed an Order inter-alia, against various sugar companies including Bajaj Hindusthan Sugar for alleged contravention of provisions of The Competition Act, 2002 in respect of joint tender floated by Oil Marketing Companies (OMCs) for supply of Ethanol and imposed penalty of Rs. 12.35 crore on the Company. Nucleus Software announced the successful go live of its lending software at VietCredit Finance Joint Stock Company in Vietnam.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(152.5)	(21.1)	(26.4)
MF(INR cr)	57.1	388.5	367.6

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,197	37,585	34,170
F&O(INR cr)	2,050,328	1,239,308	928,201

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.8	13.4	14.2
NSE VIX	14.0	14.2	13.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,277	(0.6) %	8.0 %	Energy	15,458	(0.0) %	16.3 %
IT	16,064	0.2 %	26.4 %	Pharma	10,457	(0.1) %	21.3 %
Metals	3,692	1.2 %	4.3 %	Finance	10,973	(0.8) %	6.9 %
Auto	10,528	(0.4) %	(4.8) %	PSU	2,881	(0.3) %	0.9 %
FMCG	30,488	(1.3) %	15.0 %	Real Estate	258	(1.2) %	(13.0) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bank of Ba	116	2.9 %	(18.0) %	Godrej Con	821	(4.4) %	10.4 %
B P C L	365	2.8 %	(13.8) %	General In	342	(3.7) %	(7.6) %
Coal India	281	2.7 %	1.1 %	Oracle Fin	4,107	(3.6) %	4.3 %
GAIL (Indi	385	2.6 %	18.4 %	Bajaj Fins	6,312	(3.3) %	19.8 %
JSW Steel	417	2.4 %	40.6 %	Emami	528	(3.3) %	(3.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA FX Transactions Government (AUG)	20-09-2018	1:30	AUD	-	-
RBA FX Transactions Market (AUG)	20-09-2018	1:30	AUD	-	-
RBA FX Transactions Other (AUG)	20-09-2018	1:30	AUD	-	-
ADP Publishes August Payrolls Report (AUG)	20-09-2018	12:30	CAD	-	-
SECO September 2018 Economic Forecasts	20-09-2018	5:45	CHF	-	-
Exports (MoM) (AUG)	20-09-2018	6:00	CHF	-	(0.014)
Imports (MoM) (AUG)	20-09-2018	6:00	CHF	-	(0.014)
Swiss Watch Exports (YoY) (AUG)	20-09-2018	6:00	CHF	-	0.066
SNB 3-Month Libor Lower Target Range (SEP 20)	20-09-2018	7:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (SEP 20)	20-09-2018	7:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (SEP 20)	20-09-2018	7:30	CHF	-	(0.0075)
Euro-Zone Consumer Confidence (SEP A)	20-09-2018	14:00	EUR	-	(1.9)
Retail Sales Ex Auto Fuel (MoM) (AUG)	20-09-2018	8:30	GBP	-	0.009
Retail Sales Ex Auto Fuel (YoY) (AUG)	20-09-2018	8:30	GBP	-	0.037
Retail Sales Inc Auto Fuel (MoM) (AUG)	20-09-2018	8:30	GBP	-	0.007
Retail Sales Inc Auto Fuel (YoY) (AUG)	20-09-2018	8:30	GBP	-	0.035
National Consumer Price Index (YoY) (AUG)	20-09-2018	23:30	JPY	-	0.009
National Consumer Price Index Ex Food, Energy (YoY) (AUG)	20-09-2018	23:30	JPY	-	0.008
National Consumer Price Index Ex-Fresh Food (YoY) (AUG)	20-09-2018	23:30	JPY	-	0.003
Convenience Store Sales (YoY) (AUG)	20-09-2018	7:00	JPY	-	0.001
Net Migration s.a. (AUG)	20-09-2018	22:45	NZD	-	4720
Continuing Claims (SEP 08)	20-09-2018	12:30	USD	-	-
Initial Jobless Claims (SEP 15)	20-09-2018	12:30	USD	-	-
Philadelphia Fed Business Outlook (SEP)	20-09-2018	12:30	USD	-	11.9
Existing Home Sales (AUG)	20-09-2018	14:00	USD	-	-
Existing Home Sales (MoM) (AUG)	20-09-2018	14:00	USD	-	(0.007)
Leading Index (AUG)	20-09-2018	14:00	USD	-	0.006
EIA Natural Gas Storage Change (SEP 14)	20-09-2018	14:30	USD	-	-
EIA Weekly Natural Gas Inventory (SEP 14)	20-09-2018	14:30	USD	-	-



Household Change in Net Worth (2Q)	20-09-2018	16:00	USD	-	-
U.S. to Sell 10-Year TIPS Reopening	20-09-2018	17:00	USD	-	-

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