



21 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,780	0.1 %	5.6 %
BSE SENSEX	35,547	0.7 %	7.0 %
CNX BANK	26,593	0.1 %	9.3 %
CNX MIDCAP	18,600	(0.1) %	(2.6) %
CNX SMALLCAP	7,477	(0.2) %	(5.7) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,658	(0.2) %	(0.7) %
S&P 500	2,767	0.2 %	2.7 %
FTSE 100	7,627	0.3 %	(0.3) %
HANG SENG	29,696	0.8 %	(2.7) %
NIKKEI	22,555	1.2 %	(4.0) %
SHANGHAI COMPOSITE	2,916	0.3 %	(12.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.08	0.1 %	6.9 %
EUR/USD	1.16	(0.6) %	(3.7) %
GBP/USD	1.32	(0.8) %	(2.6) %
USD/JPY	110.40	0.3 %	(2.1) %
USD/AUD	1.36	0.8 %	6.3 %
USD/SGD	1.36	0.7 %	1.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	65	(1.2) %	7.8 %
Gold(INR/10g)	30,589	(0.5) %	4.2 %
Gold Comex(USD/oz)	1,276	(0.8) %	(2.5) %
SILVER(INR/1Kg)	39,483	(0.5) %	2.3 %
Aluminium(USD/MT)	2,179	(1.9) %	(3.4) %
Copper(USD/MT)	6,820	(2.4) %	(5.0) %

FIXED INCOME

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

Global Economy: UK manufacturing order books recovered in three months to June, the Industrial Trends Survey from the Confederation of British Industry showed Wednesday. A balance of 13% said order books were above normal and a 9% said export order books remained above normal. Australia leading index, which indicates the likely pace of economic activity relative to trend three to nine months into the future, dropped to +0.11% in May from +0.83% in April, data from Westpac showed. Although the May update was the weakest since last September, the index growth rate still indicates that momentum is running above trend, Westpac said.

Global Equities: Global stocks edged up after a pounding as on ideas that Chinese central bank would offer further support to the financial institutions following the US-China trade frictions. Overall sentiments remain tight for risky assets though as US Dollar has hit 11-month highs.

Indian Economy: The US Climate Prediction Centre (CPC) has stated in a latest update that the suppressed convection (dry phase) over the Indian Ocean would be replaced by active convection (rainy phase) during the next few days. This coincides with the expected arrival of the weather-altering Madden-Julian Oscillation (MJO) as it returns to the West Africa-Indian Ocean stretch to signal the transformation. It noted that a low-pressure area over India could bring above-average rainfall to the North-Eastern States as well as over the Bay of Bengal. CPC expects enhanced rainfall from North-West India to North Andhra Pradesh-Odisha-Bengal coast into Bay of Bengal, Myanmar and Bangladesh during June 20 to 26.

Equity Markets: Some buying emerged after recent losses yesterday. Local stocks logged modest gains in a steady session of trade as global stocks rose as the panic surrounding a potential global trade war showed signs of easing. Domestic stocks snapped their two-day losing streak led by gains in index heavyweights Reliance Industries (RIL), HDFC Bank and HDFC. After opening higher, key indices pared gains in morning trade. Indices firmed up once again in mid-morning trade and hit fresh intraday high in late trade.

Corporate News: India Ratings and Research (Ind-Ra) noted that the prevailing tight financial conditions could intensify the impact of ongoing credit events unless liquidity of financing channels is at least partially reinvigorated. Ind-Ra views the adverse conditions in the interest rate market, increasing risk aversion by public sector banks (PSBs), volatile external environment and limited access to alternative financing options as critical drivers for corporate credit quality in FY19, especially for weak entities (rated BBB+ and below). Collectively and concurrently, these could pose risks for the system's financial stability. GAIL Gas, a wholly owned subsidiary of GAIL (India) and Uber, the world's largest ridesharing company, have entered into a strategic partnership to promote the usage of CNG (Compressed Natural Gas) across various cities in India. In the first leg, the initiative is being rolled out in Bengaluru and will subsequently be extended in other cities. Adani Transmission has acquired 100% equity share capital of Ghatampur Transmission (GTL) from REC Transmission Projects Company (RECTPCL) on 19 June 2018.



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)	27,440	29,138	33,257
F&O(INR cr)	887,651	771,176	802,785

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	12.5	15.2
NSE VIX	12.2	12.8	13.5

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,558	1.1 %	9.2 %	Energy	13,973	1.1 %	5.1 %
IT	13,811	(0.3) %	8.7 %	Pharma	9,291	0.4 %	7.8 %
Metals	3,460	1.0 %	(2.3) %	Finance	11,040	1.0 %	7.6 %
Auto	11,137	0.5 %	0.7 %	PSU	2,973	(0.1) %	4.1 %
FMCG	28,520	(0.5) %	7.6 %	Real Estate	284	1.1 %	(4.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Power Fin.	82	2.8 %	(5.6) %	Interglobe	1,136	(7.5) %	(14.5) %
DLF	201	2.6 %	(0.1) %	UPL	652	(3.2) %	(13.3) %
JSW Steel	335	2.3 %	13.0 %	Sun TV Net	839	(2.6) %	(2.4) %
Reliance I	1,019	2.3 %	14.1 %	Bank of Ba	125	(2.2) %	(11.8) %
Vedanta	229	2.0 %	(19.0) %	I O C L	165	(1.9) %	(3.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Foreign Exchange Transaction (Australian dollar) (MAY)	21-06-2018	1:30	AUD	-	-
RBA FX Transactions Government (MAY)	21-06-2018	1:30	AUD	-	-
RBA FX Transactions Other (MAY)	21-06-2018	1:30	AUD	-	-
ADP Publishes May Payrolls Report	21-06-2018	12:30	CAD	-	-
Wholesale Trade Sales (MoM) (APR)	21-06-2018	12:30	CAD	-	0.011
Exports (MoM) (MAY)	21-06-2018	6:00	CHF	-	0
Imports (MoM) (MAY)	21-06-2018	6:00	CHF	-	(0.004)
Swiss Watch Exports (YoY) (MAY)	21-06-2018	6:00	CHF	-	0.138
Money Supply M3 (YoY) (MAY)	21-06-2018	7:00	CHF	-	0.033
SNB 3-Month Libor Lower Target Range (JUN 21)	21-06-2018	7:30	CHF	-	(0.0125)
SNB 3-Month Libor Upper Target Range (JUN 21)	21-06-2018	7:30	CHF	-	(0.0025)
SNB Sight Deposit Interest Rate (JUN 21)	21-06-2018	7:30	CHF	-	(0.0075)
Euro-Zone Consumer Confidence (JUN A)	21-06-2018	14:00	EUR	-	0.2
Bank of England Bank Rate (JUN 21)	21-06-2018	11:00	GBP	-	0.005
BOE Asset Purchase Target (JUN)	21-06-2018	11:00	GBP	-	-
BOE Corporate Bond Target (JUN)	21-06-2018	11:00	GBP	-	-
BOE Governor Mark Carney Delivers Mansion House Speech	21-06-2018	20:15	GBP	-	-
Central Government NCR (MAY)	21-06-2018	8:30	GBP	-	-
PSNB ex Banking Groups (MAY)	21-06-2018	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (MAY)	21-06-2018	8:30	GBP	-	-
Public Sector Net Borrowing (MAY)	21-06-2018	8:30	GBP	-	-
BOJ Funo speaks in Sendai	21-06-2018	1:30	JPY	-	-
National Consumer Price Index (YoY) (MAY)	21-06-2018	23:30	JPY	-	0.006
National Consumer Price Index Ex-Fresh Food (YoY) (MAY)	21-06-2018	23:30	JPY	-	0.007
Natl CPI Ex Fresh Food, Energy (YoY) (MAY)	21-06-2018	23:30	JPY	-	0.004
Supermarket Sales (YoY) (MAY)	21-06-2018	5:00	JPY	-	(0.012)
Machine Tool Orders (YoY) (MAY F)	21-06-2018	6:00	JPY	-	0.149
Net Migration s.a. (MAY)	21-06-2018	22:45	NZD	-	4930
Continuing Claims (JUN 00)	21-06-2018	12:30	USD	-	-



Initial Jobless Claims (JUN 16)	21-06-2018	12:30	USD	-	-
Philadelphia Fed Business Outlook (JUN)	21-06-2018	12:30	USD	-	34.4
House Price Index (MoM) (APR)	21-06-2018	13:00	USD	-	0.001
Leading Index (MAY)	21-06-2018	14:00	USD	-	0.004
EIA Natural Gas Storage Change (JUN 15)	21-06-2018	14:30	USD	-	96
EIA Working Natural Gas Implied Flow (JUN 15)	21-06-2018	14:30	USD	-	96
U.S. to Sell USD5 Bln 30-Year TIPS Reopening	21-06-2018	17:00	USD	-	-

..... End of Report

