



21 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,831	(0.0) %	1.4 %
BSE SENSEX	39,602	1.2 %	1.9 %
CNX BANK	30,781	0.0 %	1.5 %
CNX MIDCAP	17,427	0.0 %	(4.9) %
CNX SMALLCAP	6,162	0.0 %	(8.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,753	0.9 %	14.7 %
S&P 500	2,954	1.0 %	17.8 %
FTSE 100	7,424	0.3 %	10.2 %
HANG SENG	28,550	1.2 %	13.6 %
NIKKEI	21,463	0.6 %	9.7 %
SHANGHAI COMPOSITE	2,987	2.4 %	21.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.59	(0.3) %	0.2 %
EUR/USD	1.12	(0.1) %	(2.1) %
GBP/USD	1.26	0.2 %	(1.2) %
USD/JPY	108.34	(0.2) %	(1.2) %
USD/AUD	1.45	(0.1) %	2.4 %
USD/SGD	1.37	(0.3) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	5.4 %	21.7 %
Gold(INR/10g)	33,520	2.0 %	6.3 %
Gold Comex(USD/oz)	1,406	4.6 %	8.9 %
SILVER(INR/1Kg)	37,910	2.1 %	(0.9) %
Aluminium(USD/MT)	1,778	1.7 %	(4.3) %
Copper(USD/MT)	5,962	1.1 %	2.1 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	(0.0) %	(0.6) %

Global Economy: The US Conference Board said its leading economic index was unchanged in May after inching up by 0.1% in April. The Philly Fed said its index for current general activity tumbled to 0.3 in June from 16.6 in May. The Bank of England maintained its interest rate and quantitative easing, as widely expected, but downgraded growth projection for the second quarter. The nine-member Monetary Policy Committee, led by Governor Mark Carney, unanimously decided to hold the bank rate at 0.75%, the bank said in a statement on Thursday. The previous change in the bank rate was a quarter-point hike in August 2018 and the rate is now at its highest level since 2009. UK retail sales, including auto fuel fell 0.5% month-on-month in May, following a 0.1% drop, figures from the Office for National Statistics showed Thursday. This was the second consecutive decrease in sales volume. The Bank of Japan maintained its ultra-loose monetary policy as widely expected. The Policy Board of the BoJ voted 7-2 to maintain interest rate at -0.1% on current accounts that financial institutions maintain at the bank. The BOJ said it will purchase government bonds so that the yield of 10-year government bonds will remain at around 0%. Japan's industrial activity rose for the first time in three months in April, figures from the Ministry of Economy, Trade and Industry showed. The all industry activity index rose 0.9% month-on-month in April, after a 0.3% fall in March. Reserve Bank of Australia Governor Philip Lowe noted that the possibility of lower interest rates remains on the table.

Global Equities: US stocks see good gains. US 10-year bond yield fell below 2% for the first time since November 2016 as expectations grew that Fed and other major central banks will ease monetary policy.

Indian Economy: National Policy for domestic workers needs to be brought in at the earliest to recognize their rights and promote better working conditions, noted Ecowrap, the latest research update from the State Bank Of India (SBI). According to the minutes of the latest RBI monetary policy meeting minutes, the RBI Monetary Policy Committee noted that growth impulses have weakened significantly as reflected in a further widening of the output gap compared to the April 2019 policy. A sharp slowdown in investment activity along with a continuing moderation in private consumption growth is a matter of concern.

Equity Markets: Key benchmark indices ended with robust gains on Thursday, supported by positive global stocks. Global shares jumped after a dovish US Federal Reserve opened the door to further rate cuts. The barometer index, the S&P BSE Sensex, gained 488.89 points or 1.25% to 39,601.63. The Nifty 50 index rose 140.30 points or 1.20% to settle at 11,831.75.

Corporate News: Maruti Suzuki India on June 20 said it has increased the price of its popular compact sedan Dzire by up to Rs 12,690 on account of compliance with new safety and emission norms. AU Small Finance Bank has approved to augment the capital by issue of Basel II compliant, Rated, Unlisted, Tier II, Unsecured Non-Convertible Redeemable Debentures, being classified as subordinated debt in one or more tranches upto Rs 500 crore. The logistics and warehousing sector saw private equity firms pump funds in excess of \$1.1 billion between Q1FY17 and Q1FY19, as per a report by property consultancy firm Anarock.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(3.2)	0.7	82.1
MF(INR cr)	(127.2)	143.6	43.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,569	31,186	34,345
F&O(INR cr)	2,632,425	1,420,810	1,232,820

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	14.8	15.9	15.2
NSE VIX	14.0	14.7	20.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,781	1.4 %	1.5 %	Energy	16,081	1.2 %	(2.7) %
IT	16,317	0.2 %	3.0 %	Pharma	8,029	3.1 %	(14.4) %
Metals	2,940	1.9 %	(5.2) %	Finance	13,438	1.2 %	7.5 %
Auto	7,965	2.5 %	(5.3) %	PSU	3,066	2.7 %	(9.4) %
FMCG	29,651	0.2 %	(1.8) %	Real Estate	275	1.9 %	3.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Yes Bank	115	11.0 %	(58.5) %	UPL	870	(8.4) %	(6.9) %
Indiabulls	600	8.0 %	(29.2) %	Wipro	287	(2.4) %	9.7 %
Piramal En	1,880	8.0 %	(30.2) %	Interglobe	1,582	(1.7) %	11.7 %
Ashok Leyl	88	5.9 %	(2.8) %	Adani Port	401	(1.6) %	4.7 %
B H E L	71	4.7 %	(6.8) %	Britannia	2,834	(1.4) %	(7.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Retail Sales (MoM) (APR)	21-06-2019	12:30	CAD	-	0.011
Retail Sales Ex Auto (MoM) (APR)	21-06-2019	12:30	CAD	-	0.017
Money Supply M3 (YoY) (MAY)	21-06-2019	7:00	CHF	-	0.035
Markit France Composite PMI (JUN P)	21-06-2019	7:15	EUR	-	51.2
Markit France Manufacturing PMI (JUN P)	21-06-2019	7:15	EUR	-	50.6
Markit France Services PMI (JUN P)	21-06-2019	7:15	EUR	-	51.5
Markit Germany Services PMI (JUN P)	21-06-2019	7:30	EUR	-	55.4
Markit/BME Germany Composite PMI (JUN P)	21-06-2019	7:30	EUR	-	52.6
Markit/BME Germany Manufacturing PMI (JUN P)	21-06-2019	7:30	EUR	-	44.3
Markit Eurozone Composite PMI (JUN P)	21-06-2019	8:00	EUR	-	51.8
Markit Eurozone Manufacturing PMI (JUN P)	21-06-2019	8:00	EUR	-	47.7
Markit Eurozone Services PMI (JUN P)	21-06-2019	8:00	EUR	-	52.9
BOE's Tenreyro Speaks in Copenhagen	21-06-2019	12:30	GBP	-	-
Central Government NCR (MAY)	21-06-2019	8:30	GBP	-	-
PSNB ex Banking Groups (MAY)	21-06-2019	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (MAY)	21-06-2019	8:30	GBP	-	-
Public Sector Net Borrowing (MAY)	21-06-2019	8:30	GBP	-	-
Nikkei Japan PMI Manufacturing (JUN P)	21-06-2019	0:30	JPY	-	49.8
BOJ Outright Bond Purchase 1~3 Years	21-06-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	21-06-2019	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	21-06-2019	1:10	JPY	-	-
Nationwide Department Store Sales (YoY) (MAY)	21-06-2019	5:30	JPY	-	(0.011)
Tokyo Department Store Sales (YoY) (MAY)	21-06-2019	5:30	JPY	-	(0.008)
Markit US Composite PMI (JUN P)	21-06-2019	13:45	USD	-	50.9
Markit US Manufacturing PMI (JUN P)	21-06-2019	13:45	USD	-	50.5
Markit US Services PMI (JUN P)	21-06-2019	13:45	USD	-	50.9
Existing Home Sales (MAY)	21-06-2019	14:00	USD	-	-
Existing Home Sales (MoM) (MAY)	21-06-2019	14:00	USD	-	(0.004)
Real Estate Event in Cincinnati with Business and Market	21-06-2019	14:00	USD	-	-



Baker Hughes U.S. Rig Count (JUN 21)	21-06-2019	17:00	USD	-	969
Fed's Daly Hosts Podcast on Community Economics	21-06-2019	19:00	USD	-	-

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