



21 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,017	(0.3) %	(5.6) %
BSE SENSEX	37,328	(0.2) %	(4.0) %
CNX BANK	27,982	(0.7) %	(7.7) %
CNX MIDCAP	15,728	(0.9) %	(14.2) %
CNX SMALLCAP	5,457	(0.6) %	(19.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,962	(0.7) %	11.3 %
S&P 500	2,901	(0.8) %	15.7 %
FTSE 100	7,125	(0.9) %	5.8 %
HANG SENG	26,232	(0.2) %	4.4 %
NIKKEI	20,677	0.6 %	5.7 %
SHANGHAI COMPOSITE	2,880	(0.1) %	16.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.40	0.3 %	2.8 %
EUR/USD	1.11	0.0 %	(3.1) %
GBP/USD	1.21	0.0 %	(4.8) %
USD/JPY	106.51	0.2 %	(2.8) %
USD/AUD	1.48	0.1 %	3.9 %
USD/SGD	1.39	(0.1) %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	2.4 %	20.8 %
Gold(INR/10g)	37,688	0.6 %	19.5 %
Gold Comex(USD/oz)	1,498	(0.7) %	16.0 %
SILVER(INR/1Kg)	43,552	0.7 %	13.8 %
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: Eurozone construction output was flat in June after decreasing 0.5% in May and 1.5% in April, Eurostat reported Tuesday. Building output gained 0.3%, while civil engineering fell 0.5%. German employment increased by seasonally adjusted 50,000 or 0.1% sequentially in the second quarter, largely due to the growth in outdoor work in spring, data from Destatis showed. On an unadjusted basis, German employment rose 324,000 but the spring upturn of 2019 was lower than the relevant average of the past five years. EU rejected British Prime Minister Boris Johnson's demand to scrap the Irish border backstop plan to achieve a Brexit deal. Reserve Bank of Australia members judge it reasonable to expect that an extended period of low interest rates would be required in Australia.

Global Equities: US stocks eased after latest surge amid lack of economic cues. Sentiments remained cautious in Europe on Italian political worries.

Indian Economy: According to the 4th Advance Estimates, total foodgrain production in the country is estimated at 284.95 million tonnes which is nearly steady compared with 285.01 million tonnes of production for 2017-18. Foodgrain output at current level is higher by 19.20 million tonnes than the previous five years' (2013-14 to 2017-18) average production. Reserve Bank deputy governor NS Vishwanathan stated that bankers need to ensure timely resolution of stressed assets under the new framework to extract the best value and underlined the need for dealing only in genuine cases. Application Laboratory of the Japanese national forecaster, Jamstec, has retained its outlook for a reasonably rainy September for India as a whole, followed by a productive North-East monsoon for the South Peninsula

Equity Markets: Local stocks ended the volatile session lower on Tuesday. Gains in IT stocks were offset by weakness in banks stocks. Nifty managed to end above the crucial 11,000 mark after flirting with level in intraday. S&P BSE Sensex fell 74.48 points or 0.2% to 37,328.48, as per the provisional closing data. Nifty 50 index fell 36.9 points or 0.33% to 11,017, as per the provisional closing data.

Corporate News: Zensar has collaborated with Aptos, a recognized market leader in retail technology solutions, to support Aptos' development of next-gen cloud applications. Himachal Futuristic Communications has received its largest ever purchase order worth Rs.2467 crore from Bharat Sanchar Nigam Limited for turnkey development, operations and maintenance of Communication Network for Indian Army. GAIL will invest over Rs 45,000 crore over the next five years to expand the National Gas Grid and city gas distribution network, its chairman Ashutosh Karnatak said on Tuesday.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(37.2)	(102.9)	15.2
MF(INR cr)	390.7	1,028.9	353.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,322	35,939	34,300
F&O(INR cr)	1,069,260	1,469,324	1,264,179

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.9	19.1	15.3
NSE VIX	16.6	16.3	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,982	(0.7) %	(7.7) %	Energy	14,440	(1.1) %	(12.7) %
IT	15,598	1.2 %	(1.5) %	Pharma	7,750	0.1 %	(17.3) %
Metals	2,351	(1.7) %	(24.2) %	Finance	12,450	(0.7) %	(0.4) %
Auto	7,041	1.2 %	(16.3) %	PSU	2,521	(2.4) %	(25.5) %
FMCG	28,670	(0.6) %	(5.0) %	Real Estate	264	(1.1) %	(1.3) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Maruti Suz	6,191	3.5 %	(9.5) %	NMDC	90	(11.5) %	(14.4) %
Tata Motor	124	2.5 %	(33.9) %	Yes Bank	71	(7.1) %	(74.2) %
Container	475	2.1 %	(10.5) %	L&T Fin.Ho	98	(6.4) %	(35.5) %
Havells In	677	2.0 %	(12.7) %	S A I L	35	(3.9) %	(37.1) %
Infosys	793	1.9 %	5.0 %	Bank of Ba	99	(3.8) %	(25.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Westpac Leading Index (MoM) (JUL)	21-08-2019	0:30	AUD	-	(0.0008)
Skilled Vacancies (MoM) (JUL)	21-08-2019	1:00	AUD	-	(0.006)
CBA Australia PMI Composite (AUG P)	21-08-2019	23:00	AUD	-	52.1
CBA Australia PMI Mfg (AUG P)	21-08-2019	23:00	AUD	-	51.6
CBA Australia PMI Services (AUG P)	21-08-2019	23:00	AUD	-	52.3
Consumer Price Index (JUL)	21-08-2019	12:30	CAD	-	136.3
Consumer Price Index (YoY) (JUL)	21-08-2019	12:30	CAD	-	0.02
Consumer Price Index Core (YoY) (JUL)	21-08-2019	12:30	CAD	-	0.018
Consumer Price Index n.s.a. (MoM) (JUL)	21-08-2019	12:30	CAD	-	(0.002)
CPI Core - Median (YoY) (JUL)	21-08-2019	12:30	CAD	-	0.022
CPI Core - Trim (YoY) (JUL)	21-08-2019	12:30	CAD	-	0.021
Money Supply M3 (YoY) (JUL)	21-08-2019	7:00	CHF	-	0.037
Central Government NCR (JUL)	21-08-2019	8:30	GBP	-	-
PSNB ex Banking Groups (JUL)	21-08-2019	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (JUL)	21-08-2019	8:30	GBP	-	-
Public Sector Net Borrowing (JUL)	21-08-2019	8:30	GBP	-	-
Foreign Buying Japan Bonds (AUG 16)	21-08-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (AUG 16)	21-08-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (AUG 16)	21-08-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (AUG 16)	21-08-2019	23:50	JPY	-	-
Supermarket Sales (YoY) (JUL)	21-08-2019	5:00	JPY	-	(0.005)
Nationwide Department Store Sales (YoY) (JUL)	21-08-2019	5:30	JPY	-	(0.009)
Tokyo Department Store Sales (YoY) (JUL)	21-08-2019	5:30	JPY	-	(0.013)
Credit Card Spending (MoM) (JUL)	21-08-2019	3:00	NZD	-	0.015
Credit Card Spending (YoY) (JUL)	21-08-2019	3:00	NZD	-	0.066
MBA Mortgage Applications (AUG 16)	21-08-2019	11:00	USD	-	0.217
Existing Home Sales (JUL)	21-08-2019	14:00	USD	-	-
Existing Home Sales (MoM) (JUL)	21-08-2019	14:00	USD	-	(0.017)
DOE Crude Oil - OPEC Quarterly (AUG 16)	21-08-2019	14:30	USD	-	-



DOE U.S. Crude Oil Inventories (AUG 16)	21-08-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (AUG 16)	21-08-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (AUG 16)	21-08-2019	14:30	USD	-	-
FOMC Meeting Minutes (JUL 31)	21-08-2019	18:00	USD	-	-

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