



21 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,234	0.0 %	10.0 %
BSE SENSEX	37,121	(0.5) %	12.5 %
CNX BANK	26,277	0.0 %	8.0 %
CNX MIDCAP	18,817	0.0 %	(1.5) %
CNX SMALLCAP	7,167	0.0 %	(9.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,657	1.0 %	7.4 %
S&P 500	2,931	0.8 %	8.7 %
FTSE 100	7,367	0.5 %	(3.7) %
HANG SENG	27,478	0.3 %	(10.0) %
NIKKEI	23,675	0.0 %	0.7 %
SHANGHAI COMPOSITE	2,729	(0.1) %	(18.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.38	(0.8) %	13.7 %
EUR/USD	1.18	1.0 %	(1.9) %
GBP/USD	1.33	0.9 %	(1.8) %
USD/JPY	112.53	0.2 %	(0.2) %
USD/AUD	1.37	(0.8) %	7.3 %
USD/SGD	1.36	(0.4) %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	1.8 %	17.8 %
Gold(INR/10g)	30,722	(0.0) %	4.6 %
Gold Comex(USD/oz)	1,211	0.4 %	(7.5) %
SILVER(INR/1Kg)	36,689	(0.6) %	(5.0) %
Aluminium(USD/MT)	1,981	(1.5) %	(12.2) %
Copper(USD/MT)	6,057	0.9 %	(15.7) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

Global Economy: The Organization for Economic Cooperation & Development, on Thursday, said the global economy will grow 3.7% each this year and next. In May, the OECD had projected 3.8% expansion for 2018 and 3.9% for 2019. The OECD slightly downgraded global growth projections for both 2018 and 2019, in its Interim Economic Outlook. The Paris-based think tank said escalating trade tensions, tightening financial conditions in emerging markets and political risks could further undermine strong and sustainable medium-term growth worldwide. The US 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.

Global Equities: DOW soared near fresh 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	11.8	13.3	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
Consumer Price Index (AUG)	21-09-2018	12:30	CAD	-	134.3
Consumer Price Index (YoY) (AUG)	21-09-2018	12:30	CAD	-	0.03
Consumer Price Index Core - Common (YoY) (AUG)	21-09-2018	12:30	CAD	-	0.019
Consumer Price Index Core - Median (YoY) (AUG)	21-09-2018	12:30	CAD	-	0.02
Consumer Price Index Core - Trim (YoY) (AUG)	21-09-2018	12:30	CAD	-	0.021
Consumer Price Index n.s.a. (MoM) (AUG)	21-09-2018	12:30	CAD	-	0.005
Retail Sales (MoM) (JUL)	21-09-2018	12:30	CAD	-	(0.002)
Retail Sales Ex Auto (MoM) (JUL)	21-09-2018	12:30	CAD	-	(0.001)
Money Supply M3 (YoY) (AUG)	21-09-2018	7:00	CHF	-	0.024
French Gross Domestic Product (QoQ) (2Q F)	21-09-2018	6:45	EUR	-	0.002
French Gross Domestic Product (YoY) (2Q F)	21-09-2018	6:45	EUR	-	0.017
Markit France Composite PMI (SEP P)	21-09-2018	7:15	EUR	-	54.9
Markit France Manufacturing PMI (SEP P)	21-09-2018	7:15	EUR	-	53.5
Markit France Services PMI (SEP P)	21-09-2018	7:15	EUR	-	55.4
Markit Germany Services PMI (SEP P)	21-09-2018	7:30	EUR	-	55
Markit/BME Germany Composite PMI (SEP P)	21-09-2018	7:30	EUR	-	55.6
Markit/BME Germany Manufacturing PMI (SEP P)	21-09-2018	7:30	EUR	-	55.9
Markit Eurozone Composite PMI (SEP P)	21-09-2018	8:00	EUR	-	54.5
Markit Eurozone Manufacturing PMI (SEP P)	21-09-2018	8:00	EUR	-	54.6
Markit Eurozone Services PMI (SEP P)	21-09-2018	8:00	EUR	-	54.4
Central Government NCR (AUG)	21-09-2018	8:30	GBP	-	-
PSNB ex Banking Groups (AUG)	21-09-2018	8:30	GBP	-	-
Public Finances (PSNCR) (Pounds) (AUG)	21-09-2018	8:30	GBP	-	-
Public Sector Net Borrowing (AUG)	21-09-2018	8:30	GBP	-	-
Nikkei Japan PMI Mfg (SEP P)	21-09-2018	0:30	JPY	-	52.5
BOJ Outright Bond Purchase 1~3 Years	21-09-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	21-09-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	21-09-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	21-09-2018	1:10	JPY	-	-



All Industry Activity Index (MoM) (JUL)	21-09-2018	4:30	JPY	-	(0.008)
Nationwide Dept Sales (YoY) (AUG)	21-09-2018	5:30	JPY	-	(0.061)
Tokyo Department Store Sales (YoY) (AUG)	21-09-2018	5:30	JPY	-	(0.045)
Credit Card Spending (MoM) (AUG)	21-09-2018	3:00	NZD	-	(0.011)
Credit Card Spending (YoY) (AUG)	21-09-2018	3:00	NZD	-	0.032
Markit US Composite PMI (SEP P)	21-09-2018	13:45	USD	-	54.7
Markit US Manufacturing PMI (SEP P)	21-09-2018	13:45	USD	-	54.7
Markit US Services PMI (SEP P)	21-09-2018	13:45	USD	-	54.8
Baker Hughes U.S. Rig Count (SEP 21)	21-09-2018	17:00	USD	-	1055

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