



22 Jun.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,733	(0.1) %	5.1 %
BSE SENSEX	35,432	(0.3) %	6.6 %
CNX BANK	26,443	(0.2) %	8.7 %
CNX MIDCAP	18,478	(0.2) %	(3.2) %
CNX SMALLCAP	7,402	(0.2) %	(6.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,462	(0.8) %	(1.5) %
S&P 500	2,750	(0.6) %	2.0 %
FTSE 100	7,556	(0.9) %	(1.2) %
HANG SENG	29,296	(1.4) %	(4.0) %
NIKKEI	22,693	0.6 %	(3.5) %
SHANGHAI COMPOSITE	2,876	(1.4) %	(14.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	67.99	(0.6) %	6.8 %
EUR/USD	1.16	0.2 %	(3.4) %
GBP/USD	1.33	0.7 %	(1.9) %
USD/JPY	110.05	(0.0) %	(2.4) %
USD/AUD	1.36	0.1 %	6.0 %
USD/SGD	1.36	0.2 %	1.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	1.8 %	9.7 %
Gold(INR/10g)	30,437	(0.5) %	3.7 %
Gold Comex(USD/oz)	1,267	(0.7) %	(3.2) %
SILVER(INR/1Kg)	39,392	(0.2) %	2.0 %
Aluminium(USD/MT)	2,179	0.0 %	(3.4) %
Copper(USD/MT)	6,819	(0.0) %	(5.0) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.1 %	0.5 %

**Global Economy:** The US Conference Board said its leading economic index edged up by 0.2% in May after rising by 0.4 in April. Bank of England decided to keep the key interest rate unchanged, in a split vote, and stood unanimous on quantitative easing. At the Monetary Policy Committee meeting, members voted 6-3 to maintain the benchmark rate at 0.50%. All members agree that any future increases in Bank Rate are likely to be at a gradual pace and to a limited extent. All nine members voted to maintain quantitative easing at GBP 435 billion. The MPC said it intends not to reduce the current stock of purchased assets until Bank Rate reaches around 1.5% compared to the previous guidance of around 2%. Any reduction in the stock of purchased assets will be conducted at a gradual and predictable pace, the bank said.

**Global Equities:** Global stocks saw a mixed to weak activity as traders eyed the recent developments on the economic front following the US-China trade spat. Commodities remained slippery and DOW dropped for eighth session.

**Indian Economy:** Domestic Crude oil production during May, 2018 was 3007.84 TMT which is 1.38% lower than target and 2.95% lower when compared with May 2017. Cumulative crude oil production during April-May, 2018 was 5922.84 TMT which is 0.61% lower than target for the period and 1.92% lower than production during corresponding period of last year. Natural gas production during May, 2018 was 2728.04 MMSCM which is 7.29% lower than the target for the month and 1.47% lower when compared with May, 2017. Cumulative natural gas production during April-May, 2018 was 5391.01 MMSCM which is 6.13% lower than target for the period but 1.67% higher than the production during corresponding period of last year.

**Equity Markets:** Local stocks closed with modest losses in last session as negative global cues hurt sentiment. Profit selling affected most pharma shares while Capital goods stocks also fell. Intraday volatility was high. Stocks opened higher and hit fresh intraday high in early trade. Indices reversed trend in morning trade and hit fresh intraday low in early afternoon trade. Key benchmark indices once again regained positive zone after hitting intraday low in early afternoon trade. Indices turned almost flat in mid-afternoon trade before a late correction.

**Corporate News:** Wipro announced that it has been positioned as a Leader in Gartner's Magic Quadrant 2018 for Oracle Application Services, Worldwide. Himachal Futuristic Communications announced that CARE has upgraded the Credit Ratings of the Company to A-; Stable (Single A Minus; Outlook: Stable). KPIT Technologies announced a strategic collaboration with Kinetiq (engaged in life sciences and clinical research consulting) to deliver new life sciences focused business technology applications. Tata Motors plans to launch around 50 commercial vehicles (CVs) this fiscal as it looks to further consolidate its position in the segment, according to media reports.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(348.7)	(64.4)	(58.1)
MF(INR cr)	489.6	303.2	476.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,293	29,148	33,188
F&O(INR cr)	1,757,000	836,897	819,237

## MARKET VOLATILITY

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

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,497	(0.2) %	8.9 %	Energy	14,064	0.7 %	5.8 %
IT	13,772	(0.3) %	8.4 %	Pharma	9,199	(1.0) %	6.7 %
Metals	3,422	(1.1) %	(3.3) %	Finance	11,044	0.0 %	7.6 %
Auto	11,033	(0.9) %	(0.2) %	PSU	2,913	(2.0) %	2.1 %
FMCG	28,331	(0.7) %	6.9 %	Real Estate	282	(0.8) %	(4.9) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Interglobe	1,176	3.5 %	(11.5) %	Punjab Nat	83	(3.2) %	(13.4) %
I O C L	170	2.9 %	(0.1) %	Pidilite I	1,038	(3.2) %	10.3 %
B P C L	422	2.7 %	(0.3) %	Bank of Ba	122	(2.5) %	(14.0) %
H P C L	315	2.4 %	(8.5) %	S A I L	82	(2.4) %	12.9 %
ICICI Bank	298	1.6 %	13.8 %	M & M	884	(2.3) %	18.1 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Consumer Price Index (MAY)	22-06-2018	12:30	CAD	-	133.3
Consumer Price Index (YoY) (MAY)	22-06-2018	12:30	CAD	-	0.022
Consumer Price Index Core (YoY) (MAY)	22-06-2018	12:30	CAD	-	0.019
Consumer Price Index n.s.a. (MoM) (MAY)	22-06-2018	12:30	CAD	-	0.003
CPI Core - Median (YoY) (MAY)	22-06-2018	12:30	CAD	-	0.021
CPI Core - Trim (YoY) (MAY)	22-06-2018	12:30	CAD	-	0.021
Retail Sales (MoM) (APR)	22-06-2018	12:30	CAD	-	0.006
Retail Sales Ex Auto (MoM) (APR)	22-06-2018	12:30	CAD	-	(0.002)
French Gross Domestic Product (QoQ) (1Q F)	22-06-2018	6:45	EUR	-	0.002
French Gross Domestic Product (YoY) (1Q F)	22-06-2018	6:45	EUR	-	0.022
Markit France Composite PMI (JUN P)	22-06-2018	7:00	EUR	-	54.2
Markit France Manufacturing PMI (JUN P)	22-06-2018	7:00	EUR	-	54.4
Markit France Services PMI (JUN P)	22-06-2018	7:00	EUR	-	54.3
Markit Germany Services PMI (JUN P)	22-06-2018	7:30	EUR	-	52.1
Markit/BME Germany Composite PMI (JUN P)	22-06-2018	7:30	EUR	-	53.4
Markit/BME Germany Manufacturing PMI (JUN P)	22-06-2018	7:30	EUR	-	56.9
Markit Eurozone Composite PMI (JUN P)	22-06-2018	8:00	EUR	-	54.1
Markit Eurozone Manufacturing PMI (JUN P)	22-06-2018	8:00	EUR	-	55.5
Markit Eurozone Services PMI (JUN P)	22-06-2018	8:00	EUR	-	53.8
Nikkei Japan PMI Manufacturing (JUN P)	22-06-2018	0:30	JPY	-	52.8
BOJ Outright Bond Purchase 1~3 Years	22-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	22-06-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	22-06-2018	1:10	JPY	-	-
All Industry Activity Index (MoM) (APR)	22-06-2018	4:30	JPY	-	0
Nationwide Department Store Sales (YoY) (MAY)	22-06-2018	5:30	JPY	-	0.007
Tokyo Department Store Sales (YoY) (MAY)	22-06-2018	5:30	JPY	-	0.019
Credit Card Spending (MoM) (MAY)	22-06-2018	3:00	NZD	-	0.006
Credit Card Spending (YoY) (MAY)	22-06-2018	3:00	NZD	-	0.07
Markit US Composite PMI (JUN P)	22-06-2018	12:45	USD	-	57.7



Markit US Manufacturing PMI (JUN P)	22-06-2018	13:45	USD	-	56.4
Markit US Services PMI (JUN P)	22-06-2018	13:45	USD	-	56.8
Baker Hughes U.S. Rig Count (JUN 22)	22-06-2018	17:00	USD	-	1059

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