



22 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,419	(1.5) %	(2.1) %
BSE SENSEX	38,337	(1.4) %	(1.4) %
CNX BANK	29,770	(2.2) %	(1.8) %
CNX MIDCAP	16,430	(2.1) %	(10.4) %
CNX SMALLCAP	5,855	(1.8) %	(13.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,154	(0.3) %	16.4 %
S&P 500	2,977	(0.6) %	18.7 %
FTSE 100	7,509	0.2 %	11.5 %
HANG SENG	28,765	1.1 %	14.5 %
NIKKEI	21,467	2.0 %	9.7 %
SHANGHAI COMPOSITE	2,924	0.8 %	18.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.66	0.0 %	(1.1) %
EUR/USD	1.12	0.2 %	(1.9) %
GBP/USD	1.25	0.5 %	(2.1) %
USD/JPY	107.69	(0.4) %	(1.8) %
USD/AUD	1.42	(0.4) %	(0.0) %
USD/SGD	1.36	(0.1) %	(0.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.8) %	19.8 %
Gold(INR/10g)	35,091	1.1 %	11.3 %
Gold Comex(USD/oz)	1,426	(1.4) %	10.5 %
SILVER(INR/1Kg)	40,624	1.4 %	6.2 %
Aluminium(USD/MT)	1,833	0.3 %	(1.3) %
Copper(USD/MT)	6,066	2.0 %	3.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	0.0 %	(0.6) %

Global Economy: University of Michigan released a report showing a slight improvement in US consumer sentiment in the month of July. The consumer sentiment index inched up to 98.4 in July from the final June reading of 98.2. Chinese households' rising debt servicing costs could weigh on the medium-term economic growth, Fitch Ratings said in a report. The rating agency noted that household debt had increased rapidly, to 85% of disposable income by the end of 2018. Euro area current account surplus increased in May, data from the European Central Bank showed. The current account surplus rose to a seasonally adjusted EUR 30 billion in May from EUR 22 billion in April. UK budget deficit widened to the highest June level in four years on bigger government spending. UK Public sector net borrowing excluding public sector banks rose by GBP 3.8 billion from the previous year to GBP 7.2 billion, the highest June borrowing since 2015. Germany's producer price inflation slowed in June, figures from Destatis showed. Producer prices advanced 1.2% year-on-year in June, slower than the 1.9% increase seen in May. Japan's all industrial activity rose 0.3% month-on-month in May, slower than 0.8% rise in April. Japan's nationwide consumer prices were up 0.7% on year in June.

Global Equities: US stocks continue to see resistance after hitting record highs. Dow slipped 0.3% to 27,154.20, Nasdaq fell 0.7% and the S&P 500 index eased dropped 0.6%.

Indian Economy: Reserve Bank of India Governor held a meeting with the CEOs of the public sector banks and the Chief Executive of Indian Banks Association (IBA). The Governor acknowledged discernible improvements in the banking sector while underscoring that several challenges still remain to be addressed, particularly with regard to the stressed asset resolution and credit flows to needy sectors. India's energy consumption is projected to grow at 4.2% per annum up to 2035. India will have to nearly double its existing hydrocarbon refining capacity to meet the fuel demand despite a rapid push towards electric vehicles, according to Minister for Petroleum and Natural Gas, Dharmendra Pradhan. Total credit exposure in India stood at Rs 116.7 Lakh Crores as of March 19 of which the corporate segment holds the largest share of 55% and exposure of Rs 64.1 Lakh Crores, noted the latest TransUnion CIBIL- SIDBI MSME Pulse update.

Equity Markets: Key equity benchmarks ended steeply lower amid broad-based selling pressure. Local stocks reversed trend and descended into negative in morning trade due to steep selling pressure. Domestic shares came under bear clutch as the government did not offer any respite to foreign investors registered as trusts from the proposed super-rich tax. Sensex fell 560.45 points or 1.44% to settle at 38,337.01, its lowest closing level since 17 May 2019. Nifty 50 index fell 177.65 points or 1.53% to settle at 11,419.25, its lowest closing level since 17 May 2019.

Corporate News: Reliance Industries (RIL) reported a 6.8% growth in consolidated yoy profit which stood at Rs 10,104 crore. Gross refining margins stood at \$8.1 per barrel as against \$10.5 per barrel in the same quarter last year. HDFC Bank posted a 21% rise in standalone net profit at Rs 5,568.16 crore for the quarter ended June 2019. Net interest income surged 23% yoy to Rs 13,294.25 crore in Q1FY20. Metal counters could be in focus as global Copper prices have soared to two and half month high. Axis Bank board has approved raising up to Rs 18,000 crore through an issue of equity shares, depository receipts or convertible securities. Cipla announced that the USFDA conducted a routine cGMP inspection at its API manufacturing facility in Virgonangar, Bengaluru, from 15 July 2019 to 19 July 2019.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(203.5)	(74.2)	46.7
MF(INR cr)	201.6	223.6	132.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	36,372	31,369	33,823
F&O(INR cr)	1,125,855	1,172,306	1,220,136

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.5	13.3	14.9
NSE VIX	12.5	13.0	18.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,770	(2.2) %	(1.8) %	Energy	15,223	(0.2) %	(7.9) %
IT	15,384	(0.7) %	(2.9) %	Pharma	8,040	(2.2) %	(14.2) %
Metals	2,742	(1.3) %	(11.6) %	Finance	13,234	(2.0) %	5.9 %
Auto	7,193	(3.3) %	(14.5) %	PSU	3,018	(1.9) %	(10.8) %
FMCG	29,028	(1.8) %	(3.9) %	Real Estate	278	(1.5) %	3.9 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
HDFC AMC	2,318	6.8 %	49.0 %	Biocon	240	(8.6) %	(22.4) %
NTPC	130	2.2 %	(3.8) %	L&T Fin.Ho	111	(5.7) %	(27.4) %
Titan Comp	1,091	1.0 %	(2.6) %	Motherson	111	(5.2) %	(28.1) %
Shriram Tr	1,062	1.0 %	(14.1) %	M & M	571	(4.4) %	(13.6) %
Coal India	222	0.7 %	(6.1) %	Piramal En	1,904	(4.4) %	(29.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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