



22 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,919	0.0 %	(6.4) %
BSE SENSEX	37,060	(0.7) %	(4.4) %
CNX BANK	27,719	0.0 %	(8.6) %
CNX MIDCAP	15,482	0.0 %	(15.6) %
CNX SMALLCAP	5,352	0.0 %	(20.6) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,203	0.9 %	12.3 %
S&P 500	2,924	0.8 %	16.7 %
FTSE 100	7,204	1.1 %	7.0 %
HANG SENG	26,270	0.2 %	4.5 %
NIKKEI	20,619	(0.3) %	5.4 %
SHANGHAI COMPOSITE	2,880	0.0 %	16.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.57	0.6 %	3.1 %
EUR/USD	1.11	(0.0) %	(3.2) %
GBP/USD	1.21	(0.1) %	(4.8) %
USD/JPY	106.40	0.0 %	(2.9) %
USD/AUD	1.48	(0.0) %	3.8 %
USD/SGD	1.39	0.0 %	1.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.1) %	20.7 %
Gold(INR/10g)	37,550	(0.4) %	19.1 %
Gold Comex(USD/oz)	1,505	0.5 %	16.6 %
SILVER(INR/1Kg)	43,672	0.3 %	14.1 %
Aluminium(USD/MT)	1,757	(0.3) %	(5.5) %
Copper(USD/MT)	5,698	(1.0) %	(2.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.6	(0.1) %	(1.1) %

Global Economy: The minutes of the US Federal Reserve's latest monetary policy meeting showed the central bank intends to remain flexible regarding future changes to interest rates. The minutes of the Federal Open Market Committee meeting held in late July showed members plan to pay close attention to the implications of incoming data for the economic outlook. During the meeting last month, the members of the Fed voted 8 to 2 to lower the target range for the federal funds rate by 25 basis points to 2 to 2.25%. UK public budget showed a surplus of 1.3 billion Pounds in July, compared to the same month last year, according to the Office for National Statistics (ONS). Australia's six month annualized growth rate in the Westpac- Melbourne Institute Leading Index that indicates likely pace of economic activity, rose to +0.05% in July from -0.09% in June. Australia's leading index moved above trend since November last year, signaling that the economy is set to grow around trend for the last three or four months of 2019 and well into the first half of next year.

Global Equities: European stocks edged up on hopes of more monetary and fiscal stimulus. Traders are waiting for the Federal Reserve's annual Jackson Hole symposium later this week.

Indian Economy: India's Crude oil production during July, 2019 was 2768.95 TMT which is 5.41% lower than target and 4.40% lower when compared with July, 2018. Cumulative crude oil production during April-July, 2019 was 10975.60 TMT which is 3.48% lower than target for the period and 6.22% lower than production during corresponding period of last year. Natural gas production during July, 2019 was 2717.92 MMSCM which is 0.16% higher when compared with July, 2018 but 5.62% lower than the monthly target. Cumulative natural gas production during April-July, 2019 was 10748.77 MMSCM which is 5.06% lower than target for the period and 0.31% lower than production during corresponding period of last year. Refinery production during July, 2019 was 21777.03 TMT which is 4.14% lower than the target for the month and 2.82% lower when compared with July, 2018. Cumulative Refinery production during April-July, 2019 was 84360.60 TMT which is 0.94% lower than the target for the period and 2.32% lower than the production during corresponding period of last year.

Equity Markets: Key equity benchmarks witnessed steep selling pressure. Indices were dragged by metal and banks stocks. Nifty came under pressure as soon as it broke the 11,000-mark. S&P BSE Sensex fell 267.64 points or 0.72% to 37,060.48, as per the provisional closing data. Nifty 50 index fell 98.3 points or 0.89% to 10,918 as per the provisional closing data.

Corporate News: TCS announced that it has been named the Goldwinner in the App of the Year category for its New York City Marathon App at the Best in Biz Awards 2019. Infosys announced that it has expanded its partnership with Google Cloud to become a Google Cloud Managed Service Provider (MSP). This will include consulting, assessment, migration, optimization and support services for enterprises looking to optimize their workloads on the Google Cloud Platform (GCP). NMDC said that the prices of iron ore with effect from 20 August 2019 has been fixed as Lump Ore (65.5%, 6-40mm) at Rs 2,900 per tonne and Fines (64%, 10 mm) at Rs 2660 per tonne. Dilip Buildcon said that the meeting of the board of directors of the company is scheduled on 26 August 2019 to consider the proposal for divestment of wholly owned subsidiaries (WOS) to one or more potential investors in a structured manner over a period of time in different tranches.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(57.0)	(99.1)	14.4
MF(INR cr)	172.4	957.5	351.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,026	35,484	34,256
F&O(INR cr)	1,316,964	1,457,604	1,264,729

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.5	19.0	15.3
NSE VIX	17.0	16.3	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,719	(0.9) %	(8.6) %	Energy	14,221	(1.5) %	(14.0) %
IT	15,578	(0.1) %	(1.7) %	Pharma	7,677	(0.9) %	(18.1) %
Metals	2,283	(2.9) %	(26.4) %	Finance	12,356	(0.8) %	(1.1) %
Auto	7,002	(0.5) %	(16.8) %	PSU	2,447	(2.9) %	(27.7) %
FMCG	28,399	(0.9) %	(5.9) %	Real Estate	259	(2.0) %	(3.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Biocon	223	2.4 %	(27.9) %	Tata Motor	112	(9.2) %	(40.0) %
Hero Motoc	2,714	1.7 %	6.1 %	Tata Motor	53	(8.3) %	(42.9) %
Container	483	1.7 %	(9.1) %	Yes Bank	65	(8.1) %	(76.3) %
Petronet L	239	1.0 %	(3.5) %	S A I L	32	(8.1) %	(42.1) %
Bosch	13,688	0.9 %	(24.4) %	Indiabulls	484	(7.3) %	(42.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Wholesale Trade Sales (MoM) (JUN)	22-08-2019	12:30	CAD	-	(0.018)
Industrial Output w.d.a. (YoY) (2Q)	22-08-2019	6:30	CHF	-	0.043
Industry & Construction Output WDA (YoY) (2Q)	22-08-2019	6:30	CHF	-	0.037
ECB Publishes Account of Policy Meeting (JUL)	22-08-2019	11:30	EUR	-	-
Euro-Zone Consumer Confidence (AUG A)	22-08-2019	14:00	EUR	-	(6.6)
Markit France Composite PMI (AUG P)	22-08-2019	7:15	EUR	-	51.9
Markit France Manufacturing PMI (AUG P)	22-08-2019	7:15	EUR	-	49.7
Markit France Services PMI (AUG P)	22-08-2019	7:15	EUR	-	52.6
Markit Germany Services PMI (AUG P)	22-08-2019	7:30	EUR	-	54.5
Markit/BME Germany Composite PMI (AUG P)	22-08-2019	7:30	EUR	-	50.9
Markit/BME Germany Manufacturing PMI (AUG P)	22-08-2019	7:30	EUR	-	43.2
Markit Eurozone Composite PMI (AUG P)	22-08-2019	8:00	EUR	-	51.5
Markit Eurozone Manufacturing PMI (AUG P)	22-08-2019	8:00	EUR	-	46.5
Markit Eurozone Services PMI (AUG P)	22-08-2019	8:00	EUR	-	53.2
CBI Reported Sales (AUG)	22-08-2019	10:00	GBP	-	(16)
CBI Total Dist. Reported Sales (AUG)	22-08-2019	10:00	GBP	-	(11)
Nikkei Japan PMI Manufacturing (AUG P)	22-08-2019	0:30	JPY	-	49.4
National Consumer Price Index (YoY) (JUL)	22-08-2019	23:30	JPY	-	0.007
National Consumer Price Index Ex-Fresh Food (YoY) (JUL)	22-08-2019	23:30	JPY	-	0.006
Natl CPI Ex Fresh Food, Energy (YoY) (JUL)	22-08-2019	23:30	JPY	-	0.005
All Industry Activity Index (MoM) (JUN)	22-08-2019	4:30	JPY	-	0.003
Machine Tool Orders (YoY) (JUL F)	22-08-2019	6:00	JPY	-	(0.33)
Bi-Weekly Core CPI (AUG 15)	22-08-2019	11:00	MXN	-	0.001
Bi-Weekly CPI (AUG 15)	22-08-2019	11:00	MXN	-	0.001
Bi-Weekly CPI (YoY) (AUG 15)	22-08-2019	11:00	MXN	-	0.037
Retail Sales Ex Inflation (QoQ) (2Q)	22-08-2019	22:45	NZD	-	0.007
Continuing Claims (AUG 10)	22-08-2019	12:30	USD	-	-
Initial Jobless Claims (AUG 17)	22-08-2019	12:30	USD	-	-
Markit US Composite PMI (AUG P)	22-08-2019	12:45	USD	-	52.6



Markit US Manufacturing PMI (AUG P)	22-08-2019	13:45	USD	-	50.4
Markit US Services PMI (AUG P)	22-08-2019	13:45	USD	-	53
Leading Index (JUL)	22-08-2019	14:00	USD	-	(0.003)
EIA Natural Gas Storage Change (AUG 16)	22-08-2019	14:30	USD	-	49
Kansas City Fed Manf. Activity (AUG)	22-08-2019	15:00	USD	-	(1)
U.S. to Sell USD7 Bln 30-Year TIPS Reopening	22-08-2019	17:00	USD	-	-

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