



22 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,245	(0.6) %	0.3 %
BSE SENSEX	34,134	(0.5) %	2.6 %
CNX BANK	25,079	(0.0) %	3.1 %
CNX MIDCAP	16,308	(1.3) %	(14.6) %
CNX SMALLCAP	5,874	(2.0) %	(25.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,444	0.3 %	2.5 %
S&P 500	2,768	(0.0) %	2.7 %
FTSE 100	7,050	0.3 %	(7.8) %
HANG SENG	26,153	2.3 %	(14.3) %
NIKKEI	22,615	0.4 %	(3.8) %
SHANGHAI COMPOSITE	2,655	4.1 %	(20.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.33	(0.4) %	15.2 %
EUR/USD	1.15	0.5 %	(4.1) %
GBP/USD	1.31	0.4 %	(3.2) %
USD/JPY	112.55	0.2 %	(0.2) %
USD/AUD	1.40	(0.3) %	9.9 %
USD/SGD	1.38	(0.2) %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.7 %	14.5 %
Gold(INR/10g)	31,706	(0.1) %	8.0 %
Gold Comex(USD/oz)	1,229	(0.1) %	(6.1) %
SILVER(INR/1Kg)	38,248	(0.4) %	(0.9) %
Aluminium(USD/MT)	2,023	0.7 %	(10.4) %
Copper(USD/MT)	6,192	0.7 %	(13.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	0.0 %	0.7 %

Global Economy: NAR said existing home sales plunged by 3.4% to an annual rate of 5.15 million in September after edging down by 0.2% to a revised rate of 5.33 million in August. China's economy grew at the slowest pace since the global financial crisis in 2009 reflecting softening activity across manufacturing and investment amid increasing trade tensions and measures to rein in excessive lending. Gross domestic product rose by 6.5% year-on-year in the third quarter, slower than the 6.7% growth seen in the second quarter. Euro area current account surplus increased in August from the previous month, preliminary data from the European Central Bank showed on Friday. The current account surplus rose to EUR 24 billion from EUR 19 billion in July. A year ago, the surplus was EUR 39 billion. The visible trade surplus increased to EUR 22 billion from EUR 19 billion in the previous month, while the surplus in services trade decreased to EUR 9 billion from EUR 10 billion. Consumer prices in Japan were up 1.2% on year in September, the Ministry of Internal Affairs and Communication said on Friday. The figure stayed at 1.3% in August.

Global Equities: Sentiments remained stressed on Chinese growth concerns. The benchmark Shanghai Composite index has dropped to its lowest level in nearly four years.

Indian Economy: The Reserve Bank Of India (RBI) has decided that, with immediate effect, banks will be permitted to also reckon Government securities held by them up to an amount equal to their incremental outstanding credit to NBFCs and Housing Finance Companies (HFCs), over and above the amount of credit to NBFCs and HFCs outstanding on their books as on October 19, 2018, as Level 1HQLA under Facility to Avail Liquidity for Liquidity Coverage Ratio (FALLCR) within the mandatory SLR requirement. This will be in addition to the existing FALLCR of 13% of NDTL, and limited to 0.5% of the bank's NDTL. The additional FALLCR will be available up to December 31, 2018. The single borrower exposure limit for NBFCs which do not finance infrastructure stands increased from 10% to 15% of capital funds, up to December 31, 2018.

Equity Markets: Local stocks stayed under pressure in last session. The domestic market dropped for a second straight session on Friday, dragged by selling in index heavyweight Reliance Industries, HDFC and Infosys. Negative global cues weighed on market sentiment. The Sensex fell 463.95 points or 1.33% to settle at 34,315.63. The index fell 216.29 points, or 0.62% at the day's high of 34,563.29. The index fell 639.26 points, or 1.84% at the day's low of 34,140.32.

Corporate News: Net profit of HDFC Bank rose 20.59% to Rs 5005.73 crore on 21.2% rise in total income to Rs 28215.15 crore in Q2 September 2018 over Q2 September 2017. The result was announced on Saturday, 20 October 2018. Drug major Lupin's specialty pharma division, Lupin Neurosciences, announced that the Committee for Medicinal Products for Human Use (CHMP), the scientific committee of the European Medicines Agency (EMA), has adopted a positive opinion recommending the marketing authorization of NaMuscla (mexiletine hydrochloride) for the symptomatic treatment of myotonia in adults with non-dystrophic myotonic (NDM) disorders. Reliance Power said that its wholly owned subsidiary, Sasan Power, has won an arbitration award against North American Coal Corporation (NACC). NACC's claim of 'US\$32 million' (Rs 235 crore) consisting of liquidated damages, interest and legal cost has been dismissed.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	42.9	(204.7)	(48.7)
MF(INR cr)	818.3	1,082.7	460.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	33,384	38,899	35,337
F&O(INR cr)	871,268	1,096,866	969,534

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.9	17.9	14.4
NSE VIX	21.4	19.0	14.0

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,079	(0.0) %	3.1 %	Energy	13,662	(2.5) %	2.8 %
IT	14,421	(0.4) %	13.5 %	Pharma	9,647	(0.0) %	11.9 %
Metals	3,340	(0.8) %	(5.6) %	Finance	10,336	0.5 %	0.7 %
Auto	8,700	0.1 %	(21.3) %	PSU	2,671	(0.6) %	(6.4) %
FMCG	28,798	(0.2) %	8.7 %	Real Estate	204	(0.3) %	(31.3) %

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>
Indiabulls	713	9.1 %	(42.7) %	IndusInd B	1,449	(8.1) %	(19.7) %
Eicher Mot	22,425	3.7 %	(20.7) %	B P C L	271	(4.4) %	(36.0) %
ICICI Bank	327	3.7 %	24.9 %	Bosch	18,285	(4.1) %	(1.2) %
L&T Fin.Ho	122	2.6 %	(23.9) %	UltraTech	3,463	(4.1) %	(13.0) %
Colgate-Pa	1,125	2.3 %	6.4 %	United Spi	509	(3.9) %	(22.0) %

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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