



22 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,662	0.0 %	(0.1) %
BSE SENSEX	39,298	0.6 %	0.8 %
CNX BANK	29,120	0.0 %	(4.0) %
CNX MIDCAP	16,214	0.0 %	(11.6) %
CNX SMALLCAP	5,568	0.0 %	(17.4) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,828	0.2 %	15.0 %
S&P 500	3,007	0.7 %	19.9 %
FTSE 100	7,164	0.2 %	6.4 %
HANG SENG	26,726	0.0 %	6.3 %
NIKKEI	22,549	0.3 %	15.3 %
SHANGHAI COMPOSITE	2,940	0.1 %	19.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.99	(0.4) %	2.2 %
EUR/USD	1.11	0.5 %	(3.0) %
GBP/USD	1.28	0.4 %	0.7 %
USD/JPY	108.71	(0.0) %	(0.8) %
USD/AUD	1.47	(1.0) %	3.4 %
USD/SGD	1.37	(0.4) %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	53	(0.9) %	14.5 %
Gold(INR/10g)	38,241	0.0 %	21.3 %
Gold Comex(USD/oz)	1,487	(0.5) %	15.2 %
SILVER(INR/1Kg)	45,203	0.1 %	18.1 %
Aluminium(USD/MT)	1,736	0.4 %	(6.6) %
Copper(USD/MT)	5,820	1.2 %	(0.3) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	0.1 %	(0.8) %

Global Economy: Germany might have entered a technical recession in the third quarter, the Bundesbank said in its monthly report on Monday. A recession in the sense of a significant, broader and sustained decline in output with underutilized capacity is currently not in view, the central bank said. The largest euro area economy contracted 0.1% in the second quarter. While domestic demand remains robust, export-oriented manufacturing industry continued its downturn, Bundesbank noted. UK households' perception of financial wellbeing remained negative in October but the assessment improved from September, data from IHS Markit showed Monday. The household finance index rose to 44.4 from 43.1 in the previous month. This was the highest score since January. The People's Bank of China left the one-year loan prime rate unchanged at 4.20%. The five-year lending rate was also maintained at 4.85%. House prices in majority of the Chinese cities increased in September, data from the National Bureau of Statistics showed on Monday. On a monthly basis, house prices increased in 53 cities out of 70. In August, house prices had increased in 55 cities. The house prices in four first-tier cities grew 0.4% from the previous month. At the same time, prices in 31 second-tier cities gained 0.6% on month and that in 35 third-tier cities climbed 0.8%.

Global Equities: US stocks edged up on renewed optimism about the completion of phase one of a US-China trade deal following comments from President Donald Trump and Chinese Vice Premier Liu He.

Indian Economy: Reserve Bank Of India Governor Shaktikanta Das noted in the last monetary policy meeting that the economic activity has weakened further since the last MPC meeting in August 2019 with growth for Q1:2019-20 turning out to be 5%. Various high frequency indicators show that economic activity remained weak in Q2. Inflation has evolved broadly along the projected lines and remains benign; while food inflation has edged up further in the last two months reflecting the sharper than expected increase in food prices, CPI inflation excluding food and fuel has moderated consistent with the slowing down of the economy.

Equity Markets: The market extended rally for sixth straight session on Thursday. The sentiment was boosted by foreign funds turning net buyers of Indian stocks in the past few sessions. Better-than-expected Q2 results from a few companies also supported buying. The barometer index, the BSE Sensex, rose 246.32 points or 0.63% to 39,298.38. The Nifty 50 index rose 75.50 points or 0.65% to 11,661.85.

Corporate News: Reliance Industries' consolidated net profit rose 18.35% to Rs 11262 crore on 3.63% rise in net sales to Rs 148526 crore in Q2 September 2019 over Q2 September 2018. The result was announced after market hours on Friday, 18 October 2019. HDFC Bank's net profit rose 26.75% to Rs 6344.99 crore on 19.63% increase in total income to Rs 33755 crore in Q2 September 2019 over Q2 September 2018. The result was announced on Saturday, 19 October 2019. Infosys can see heavy selling pressure. Ethical Employees, a whistleblower group, has allegedly complained to the US Securities and Exchange Commission (SEC) and the Infosys' board that CEO Salil Parekh was indulging in "unethical practices" to boost short-term revenue and profit. Auto stocks would be in focus. The Federation of Automobile Dealers Associations (FADA) noted that the September Auto Registration fell to a newer low and continued to reflect weakness in customer sentiment even with onset of Festival season and never seen before discounts. On a YoY basis, overall Vehicle Registrations fell by 12.9%. 2-Wheeler was down by 12.1%, CV was down by 18.5%, PV reduced by 20.1% and 3W saw a marginal growth of 1.8%.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	178.5	67.1	15.4
MF(INR cr)	1,441.1	539.3	422.0

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	45,378	36,343	35,455
F&O(INR cr)	745,110	1,495,352	1,341,839

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.5	15.7
NSE VIX	15.9	17.0	17.4

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,120	0.5 %	(4.0) %	Energy	16,184	1.3 %	(2.1) %
IT	15,410	0.8 %	(2.7) %	Pharma	7,608	1.0 %	(18.8) %
Metals	2,456	1.9 %	(20.8) %	Finance	13,213	0.5 %	5.7 %
Auto	7,965	0.6 %	(5.3) %	PSU	2,249	1.4 %	(33.6) %
FMCG	31,501	0.5 %	4.3 %	Real Estate	263	1.9 %	(1.6) %

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	231	16.8 %	(72.7) %	Zee Entert	250	(5.4) %	(42.0) %
Yes Bank	51	8.4 %	(81.4) %	Bandhan Ba	555	(2.4) %	4.6 %
NMDC	109	6.5 %	3.3 %	Tata Motor	137	(1.9) %	(27.0) %
HDFC AMC	2,883	6.1 %	85.3 %	Motherson	108	(1.6) %	(30.0) %
Piramal En	1,557	6.0 %	(42.2) %	Tata Motor	61	(1.5) %	(33.5) %

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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