



23 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,621	0.4 %	13.8 %
BSE SENSEX	38,286	0.0 %	15.5 %
CNX BANK	28,322	0.2 %	16.4 %
CNX MIDCAP	19,688	0.3 %	3.1 %
CNX SMALLCAP	7,609	0.3 %	(4.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,734	(0.3) %	3.7 %
S&P 500	2,862	(0.0) %	6.2 %
FTSE 100	7,574	0.1 %	(1.0) %
HANG SENG	27,928	0.6 %	(8.5) %
NIKKEI	22,363	0.6 %	(4.9) %
SHANGHAI COMPOSITE	2,715	(0.7) %	(18.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.83	0.0 %	9.7 %
EUR/USD	1.16	0.4 %	(3.7) %
GBP/USD	1.29	0.5 %	(4.7) %
USD/JPY	110.76	0.7 %	(1.7) %
USD/AUD	1.37	0.8 %	7.2 %
USD/SGD	1.37	0.2 %	2.6 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	67	1.4 %	11.6 %
Gold(INR/10g)	29,529	0.5 %	0.6 %
Gold Comex(USD/oz)	1,202	0.1 %	(8.2) %
SILVER(INR/1Kg)	36,993	0.4 %	(4.2) %
Aluminium(USD/MT)	2,041	0.4 %	(9.6) %
Copper(USD/MT)	6,026	1.0 %	(16.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

Global Economy: The US Federal Reserve officials at their last meeting indicated that they were likely to raise interest rates next month and expressed more concerns than before that prolonged trade disputes could disrupt economic growth. Reserve Bank Of Australia (RBA) noted in the minutes of its latest monetary policy meeting that the Bank's forecast was for global growth to ease a little over the following few years, but to remain above trend. Members noted that, although this forecast was broadly unchanged from three months earlier, the risks to the international economic outlook had shifted. Although the direct effects of trade protectionism measures that had been implemented and further measures that had been proposed were expected to be small, the broader risk of adverse effects on investment decisions and confidence had increased.

Global Equities: Shares mostly rose this week on optimism over trade talks between the United States and China. Immediate focus was on the lower-level trade talks due to start this week between the United States and China.

Indian Economy: N S Vishwanathan, Deputy Governor of Reserve Bank of India, highlighted the importance of the MSME sector in a speech. The MSME sector plays an important role in any economy, and India is no exception. Recognising their role as providers of employment and generators of export, the Government and RBI have taken affirmative measures to strengthen the sector. And in order to ensure that the larger entities within the sector do not crowd out the smaller ones, the banks have been given specific targets to address the latter group, he noted.

Equity Markets: Local indices settled with small gains after a quiet session of trade in last session. The Sensex and the Nifty, both, attained record high on intraday as well as closing basis. Domestic stocks reversed intraday gains soon after a gap-up opening pushed the Sensex and the Nifty to record high.

Corporate News: Housing Development Finance Corporation (HDFC) said it entered into an agreement for acquiring 30.52 lakh shares, representing 25.01% share capital of Good Host Spaces Private Limited from Manipal Integrated Services Private Ltd. IT major Infosys said it inaugurated its technology and innovation hub in Raleigh, North Carolina. In addition, Infosys announced that it has hired more than 4,700 Americans since Spring 2017, including nearly 500 in North Carolina, as part of the company's campaign to hire 10,000 American and accelerate the pace of innovation for American industry. Lupin announced the launch of its Clobetasol Propionate Cream USP 0.05%, having received an approval from the United States Food and Drug Administration (FDA) earlier. Hinduja Global Solutions announced the launch of its Smart Class Program, a CSR initiative to drive overall educational development of underprivileged children in 16 Government schools - 10 in Indore and 6 in Chennai. The Allahabad High Court has reserved judgment on a case filed by power producers against the controversial Reserve Bank of India circular on stressed assets, according to media reports.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	19.1	4.1	(25.8)
MF(INR cr)	(44.6)	117.2	378.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,870	35,582	33,389
F&O(INR cr)	711,443	919,863	877,396

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.9	12.5	14.4
NSE VIX	12.9	12.8	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,258	(0.1) %	16.2 %	Energy	15,622	0.7 %	17.5 %
IT	15,135	0.9 %	19.1 %	Pharma	9,951	1.5 %	15.4 %
Metals	3,467	(0.3) %	(2.1) %	Finance	11,706	(0.0) %	14.1 %
Auto	10,979	(0.2) %	(0.7) %	PSU	3,278	(0.2) %	14.9 %
FMCG	32,306	(0.2) %	21.9 %	Real Estate	273	(1.8) %	(7.9) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Cummins In	752	6.1 %	5.1 %	DLF	208	(3.1) %	3.6 %
UPL	646	4.4 %	(14.1) %	Tata Steel	582	(2.9) %	0.6 %
Ambuja Cem	239	4.2 %	(0.4) %	B P C L	369	(1.9) %	(12.9) %
A B B	1,270	3.3 %	(1.7) %	NMDC	104	(1.8) %	(12.0) %
Tech Mahin	709	3.1 %	10.8 %	Avenue Sup	1,588	(1.7) %	17.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Boulton Speech in Sydney	23-08-2018	02:45	AUD	-	-
Industrial Output w.d.a. (YoY) (2Q)	23-08-2018	07:15	CHF	-	0.09
Industry & Construction Output WDA (YoY) (2Q)	23-08-2018	07:15	CHF	-	0.081
Markit France Composite PMI (AUG P)	23-08-2018	07:00	EUR	-	54.4
Markit France Manufacturing PMI (AUG P)	23-08-2018	07:00	EUR	-	53.3
Markit France Services PMI (AUG P)	23-08-2018	07:00	EUR	-	54.9
Bundesbank's Weidmann at Berlin Foreign Press Club	23-08-2018	07:30	EUR	-	-
Markit Germany Services PMI (AUG P)	23-08-2018	07:30	EUR	-	54.1
Markit/BME Germany Composite PMI (AUG P)	23-08-2018	07:30	EUR	-	55
Markit/BME Germany Manufacturing PMI (AUG P)	23-08-2018	07:30	EUR	-	56.9
Markit Eurozone Composite PMI (AUG P)	23-08-2018	08:00	EUR	-	54.3
Markit Eurozone Manufacturing PMI (AUG P)	23-08-2018	08:00	EUR	-	55.1
Markit Eurozone Services PMI (AUG P)	23-08-2018	08:00	EUR	-	54.2
ECB Account of the Monetary Policy Meeting (JUL 26)	23-08-2018	11:30	EUR	-	-
Euro-Zone Consumer Confidence (AUG A)	23-08-2018	14:00	EUR	-	(0.6)
CBI Reported Sales (AUG)	23-08-2018	10:00	GBP	-	20
CBI Total Dist. Reported Sales (AUG)	23-08-2018	10:00	GBP	-	25
Nikkei Japan PMI Manufacturing (AUG P)	23-08-2018	00:30	JPY	-	52.3
Coincident Index (JUN F)	23-08-2018	05:00	JPY	-	116.3
Leading Index CI (JUN F)	23-08-2018	05:00	JPY	-	105.2
National Consumer Price Index (YoY) (JUL)	23-08-2018	23:30	JPY	-	0.007
National Consumer Price Index Ex Fresh Food, Energy (YoY) (JUL)	23-08-2018	23:30	JPY	-	0.002
National Consumer Price Index Ex-Fresh Food (YoY) (JUL)	23-08-2018	23:30	JPY	-	0.008
Bi-Weekly Consumer Price Index (AUG 15)	23-08-2018	13:00	MXN	-	0.0018
Bi-Weekly Consumer Price Index (YoY) (AUG 15)	23-08-2018	13:00	MXN	-	0.0477
Bi-Weekly Core Consumer Price Index (AUG 15)	23-08-2018	13:00	MXN	-	0.0005
Exports (JUL)	23-08-2018	22:45	NZD	-	-
Imports (JUL)	23-08-2018	22:45	NZD	-	-
Treasury Bill Auction (AUG)	23-08-2018	22:45	NZD	-	-



Trade Balance 12 Mth YTD (JUL)	23-08-2018	22:45	NZD	-	-
Continuing Claims (AUG 11)	23-08-2018	12:30	USD	-	-
Initial Jobless Claims (AUG 18)	23-08-2018	12:30	USD	-	-
House Price Index (MoM) (JUN)	23-08-2018	13:00	USD	-	0.002
House Price Purchase Index (QoQ) (2Q)	23-08-2018	13:00	USD	-	0.017
Markit US Composite PMI (AUG P)	23-08-2018	13:45	USD	-	55.7
Markit US Manufacturing PMI (AUG P)	23-08-2018	13:45	USD	-	55.3
Markit US Services PMI (AUG P)	23-08-2018	13:45	USD	-	56
New Home Sales (JUL)	23-08-2018	14:00	USD	-	-
New Home Sales (MoM) (JUL)	23-08-2018	14:00	USD	-	(0.053)
EIA Natural Gas Storage Change (AUG 17)	23-08-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (AUG 17)	23-08-2018	14:30	USD	-	-
Kansas City Fed Manf. Activity (AUG)	23-08-2018	15:00	USD	-	23
U.S. to Sell 5-Year TIPS Reopening	23-08-2018	17:00	USD	-	-

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