



23 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	25,317	(0.5) %	2.0 %
S&P 500	2,756	(0.4) %	2.2 %
FTSE 100	7,043	(0.1) %	(7.9) %
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	73.56	(0.1) %	15.5 %
EUR/USD	1.15	0.0 %	(4.6) %
GBP/USD	1.30	(0.4) %	(4.0) %
USD/JPY	112.59	0.2 %	(0.1) %
USD/AUD	1.41	0.4 %	10.6 %
USD/SGD	1.38	0.0 %	3.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.7 %	14.5 %
Gold(INR/10g)	31,607	(0.3) %	7.7 %
Gold Comex(USD/oz)	1,229	(0.1) %	(6.1) %
SILVER(INR/1Kg)	38,315	0.2 %	(0.7) %
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:** Japan's all industry activity recovered in August, figures from the Ministry of Economy, Trade and Industry showed Monday. The all industry activity index climbed 0.5% month-on-month in August, reversing a 0.2% drop in July and a 0.9% drop in June. A majority of British firms said that the Brexit had a negative effect on investment decision, according to a new research on business preparations by the Confederation of British Industry. Eight out of ten firms said Brexit hit investment as speed of talks outpaced by reality firms face on ground.

**Global Equities:** The US markets showed a lack of direction before closing on opposite sides of the unchanged line for the second consecutive session as economic cues were absent.

**Indian Economy:** The Indian cargo industry needs to grow at a rate of about 12.9% every year from 2018 to 2027 to achieve National Civil Aviation Policy (NCAP 2016) vision of reaching cargo volumes of 10 million tonnes (MT) by 2027, noted a recent ASSOCHAM-Auctus Advisors joint study. There is an urgent need to uplift Indian cargo market to achieve the overall vision of the aviation ministry, suggested the knowledge report on Civil Aviation and Cargo, conducted by The Associated Chambers of Commerce and Industry of India (ASSOCHAM) jointly with consultancy firm Auctus Advisors. The report noted that international and domestic air freight is projected to grow at an overall compounded annual growth rate (CAGR) of 8.2%.

**Equity Markets:** Local equity benchmarks declined for third day in a row amid volatility, dragged by Reliance Industries, IndusInd Bank and Kotak Mahindra Bank. The Sensex fell 181.25 points or 0.53% to settle at 34,134.38. The index rose 433.06 points, or 1.26% at the day's high of 34,748.69. The index fell 232.87 points, or 0.68% at the day's low of 34,082.76.

**Corporate News:** Asian Paints' net profit fell 14.77% to Rs 506 crore on 8.76% increase in net sales to Rs 4639.05 crore in Q2 September 2018 over Q2 September 2017. The result was announced after market hours yesterday, 22 October 2018. Bharat Heavy Electricals (Bhel) said its board will meet on 25 October 2018 to consider the proposal for buyback of the fully paid-up equity shares of the company. The announcement was made after market hours yesterday, 22 October 2018.

IID Cementation India said it won orders valued over Rs 1066 crore from Airports Authority of India, Vizhinjam Port, Visakhapatam Port, Mumbai Metro and Rail Vikas Nigam.



## FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(90.0)	(195.9)	(49.0)
MF(INR cr)	555.7	956.1	457.1

## 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>
RBA's Bullock speaks on panel in Sydney	23-10-2018	03:00	AUD	-	-
RBA's DeBelle speaks on panel in Sydney	23-10-2018	04:30	AUD	-	-
Swift Global Payments CNY (SEP)	23-10-2018	06:00	CNY	-	0.0212
German Producer Price Index (MoM) (SEP)	23-10-2018	06:00	EUR	-	0.003
German Producer Price Index (YoY) (SEP)	23-10-2018	06:00	EUR	-	0.031
Euro-Zone Consumer Confidence (OCT A)	23-10-2018	14:00	EUR	-	(2.9)
CBI Business Optimism (OCT)	23-10-2018	10:00	GBP	-	(3)
CBI Trends Selling Prices (OCT)	23-10-2018	10:00	GBP	-	13
CBI Trends Total Orders (OCT)	23-10-2018	10:00	GBP	-	(1)
BOE Chief Economist Haldane Speaks in Paris	23-10-2018	10:30	GBP	-	-
BOE's Carney Speaks at a Conference	23-10-2018	15:20	GBP	-	-
Supermarket Sales (YoY) (SEP)	23-10-2018	05:00	JPY	-	0.001
Nationwide Department Store Sales (YoY) (SEP)	23-10-2018	05:30	JPY	-	(0.002)
Tokyo Department Store Sales (YoY) (SEP)	23-10-2018	05:30	JPY	-	0.016
Machine Tool Orders (YoY) (SEP F)	23-10-2018	06:00	JPY	-	0.028
Nikkei Japan PMI Manufacturing (OCT P)	23-10-2018	23:30	JPY	-	52.5
Economic Activity IGAE (YoY) (AUG)	23-10-2018	13:00	MXN	-	0.0332
Fed's Kashkari Speaks at Early Childhood Development Event	23-10-2018	13:30	USD	-	-
Richmond Fed Manufact. Index (OCT)	23-10-2018	14:00	USD	-	29
U.S. to Sell 4-Week Bills	23-10-2018	15:30	USD	-	-
U.S. to Sell 8-Week Bills	23-10-2018	15:30	USD	-	-
U.S. to Sell USD38 Bln 2-Year Notes	23-10-2018	17:00	USD	-	-
Fed's Bostic Speaks on Economy and Monetary Policy	23-10-2018	17:30	USD	-	-
Fed's Kaplan Speaks at Economic Development Event in Texas	23-10-2018	18:15	USD	-	-

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