



23 Oct.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,623	0.3 %	(0.4) %
BSE SENSEX	38,964	(0.9) %	0.5 %
CNX BANK	29,411	0.0 %	(3.0) %
CNX MIDCAP	16,227	0.0 %	(11.5) %
CNX SMALLCAP	5,624	0.0 %	(16.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,788	(0.2) %	14.8 %
S&P 500	2,996	(0.4) %	19.5 %
FTSE 100	7,212	0.7 %	7.1 %
HANG SENG	26,786	0.2 %	6.6 %
NIKKEI	22,549	0.3 %	15.3 %
SHANGHAI COMPOSITE	2,954	0.5 %	19.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.69	(0.8) %	1.8 %
EUR/USD	1.12	1.0 %	(2.6) %
GBP/USD	1.30	1.4 %	1.7 %
USD/JPY	108.55	(0.2) %	(1.0) %
USD/AUD	1.46	(1.8) %	2.5 %
USD/SGD	1.36	(0.7) %	(0.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	1.6 %	16.4 %
Gold(INR/10g)	38,192	(0.1) %	21.1 %
Gold Comex(USD/oz)	1,492	0.4 %	15.6 %
SILVER(INR/1Kg)	45,530	0.7 %	19.0 %
Aluminium(USD/MT)	1,708	(1.6) %	(8.1) %
Copper(USD/MT)	5,794	105.5 %	(0.8) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.8	(0.0) %	(0.9) %

Global Economy: National Association of Realtors said US existing home sales fell by 2.2% to an annual rate of 5.38 million in September after jumping by 1.5% to an upwardly revised 5.50 million in August. UK manufacturing output continued its downturn in three months to October reflecting sharp decline in the auto sector, survey results from the Confederation of British Industry showed on Tuesday. The balance of output volume decreased to -10% from +1% in September. The balance of manufacturers reporting a fall in new orders came in at -15% in the quarter to October, the same rate as in July. UK budget deficit for September increased for the first time in five years, data from the Office for National Statistics showed Tuesday. Public sector net borrowing excluding banks increased by GBP 0.6 billion from last year to GBP 9.4 billion in September. Hong Kong's consumer price inflation eased to the lowest level in four months in September, data from the Census and Statistics Department showed on Tuesday. The consumer price index rose 3.2% year-on-year in September, slower than 3.5% increase in August.

Global Equities: US markets ended marginally lower as some profit selling emerged. Brexit remains the main issue after British Prime Minister Boris Johnson was denied a chance Monday to hold a vote by lawmakers on his Brexit bill.

Indian Economy: Usha Padhee, Joint Secretary, Ministry of Civil Aviation, Government of India said that the government will continue with privatisation in the aviation sector and more airports will be privatised soon. Indian civil aviation sector is growing at a rapid pace and is attracting a lot of investment, particularly from the private sector, she noted further. India's foreign exchange reserves increased by US\$ 1.88 billion to US\$ 439.71 billion in the week ended 11 October 2019. The foreign exchange reserves had stood at US\$ 437.83 a week ago. Within the foreign exchange reserves, the foreign currency assets moved up to US\$ 407.88 billion in the week ended 11 October 2019 from US\$ 405.61 billion a week ago.

Equity Markets: Local stocks tumbled on Tuesday as traders booked profits after six-day rising streak. A sharp fall in IT major Infosys put pressure on bourses. Private banks, however, supported the indices at lower levels. BSE Sensex fell 334.54 points or 0.85% to 38,963.84. The Nifty 50 index fell 71.95 points or 0.62% to 11,589.90. S&P BSE Mid-Cap index fell 0.09% while the S&P BSE Small-Cap index rose 0.48%.

Corporate News: IT counters can see further selling pressure on rising Indian Rupee. Rupee gained today as traders eyed increased foreign investment flows. INR closed at 70.94 per US dollar, rising 20 basis points on the day. Kotak Mahindra Bank (Kotak) has launched its very first overseas branch at the Dubai International Financial Centre (DIFC), Dubai, UAE after receiving due regulatory approvals. Axis Bank reported net loss of Rs 112.08 crore in Q2 September 2019 as compared to net profit of Rs 789.61 crore in Q2 September 2018. Total income rose 21.14% to Rs 19333.57 crore in Q2 September 2019 over Q2 September 2018. Asian Paints' consolidated net profit rose 67.5% to Rs 823.41 crore on 10.3% rise in total income to Rs 5171.20 crore in Q2 September 2019 over Q2 September 2018. Bajaj Finserv's consolidated net profit rose 70.98% to Rs 1203.72 crore on 46.67% rise in total income to Rs 14224.22 crore in Q2 September 2019 over Q2 September 2018. RBL Bank's net profit dropped 74.87% to Rs 53.42 crore on 46.42% rise in total income to Rs 2633.65 crore in Q2 September 2019 over Q2 September 2018. CEAT's consolidated net profit dropped 30.38% to Rs 43.98 crore on 4.53% fall in total income to Rs 1700.62 crore in Q2 September 2019 over Q2 September 2018.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	15.1	59.1	15.4
MF(INR cr)	334.0	467.1	417.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	52,799	37,609	35,584
F&O(INR cr)	1,027,370	1,459,353	1,339,510

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.0	17.5	15.7
NSE VIX	16.8	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	29,411	1.0 %	(3.0) %	Energy	16,269	0.5 %	(1.6) %
IT	14,689	(4.7) %	(7.3) %	Pharma	7,746	1.8 %	(17.4) %
Metals	2,443	(0.5) %	(21.3) %	Finance	13,344	1.0 %	6.8 %
Auto	7,937	(0.4) %	(5.7) %	PSU	2,261	0.6 %	(33.2) %
FMCG	31,659	0.5 %	4.9 %	Real Estate	264	0.4 %	(1.3) %

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>
Piramal En	1,680	7.9 %	(37.6) %	Infosys	644	(16.2) %	(14.8) %
SBI Life I	989	6.8 %	65.4 %	General In	260	(7.0) %	5.6 %
DLF	178	5.5 %	(8.9) %	Indiabulls	218	(5.7) %	(74.3) %
HDFC AMC	3,021	4.8 %	94.1 %	Ambuja Cem	196	(5.7) %	(16.5) %
Shree Ceme	19,516	4.5 %	3.8 %	New India	136	(5.1) %	(27.8) %

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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