



24 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,724	(0.9) %	0.5 %
BSE SENSEX	39,194	(1.0) %	0.8 %
CNX BANK	30,628	(0.5) %	1.0 %
CNX MIDCAP	17,412	(0.1) %	(5.0) %
CNX SMALLCAP	6,146	(0.2) %	(8.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,719	(0.1) %	14.5 %
S&P 500	2,950	(0.1) %	17.7 %
FTSE 100	7,408	(0.2) %	10.0 %
HANG SENG	28,474	(0.3) %	13.3 %
NIKKEI	21,259	(1.0) %	8.7 %
SHANGHAI COMPOSITE	3,002	0.5 %	21.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.45	(0.2) %	0.0 %
EUR/USD	1.13	0.7 %	(1.4) %
GBP/USD	1.27	0.8 %	(0.4) %
USD/JPY	107.57	(0.7) %	(1.9) %
USD/AUD	1.45	(0.6) %	1.8 %
USD/SGD	1.36	(0.6) %	(0.5) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.0 %	23.0 %
Gold(INR/10g)	33,909	1.2 %	7.5 %
Gold Comex(USD/oz)	1,399	(0.5) %	8.4 %
SILVER(INR/1Kg)	37,860	(0.1) %	(1.1) %
Aluminium(USD/MT)	1,744	(1.9) %	(6.2) %
Copper(USD/MT)	5,941	(0.4) %	1.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	0.1 %	(0.6) %

Global Economy: The National Association of Realtors (NAR) said that existing US home sales soared by 2.5% to an annual rate of 5.34 million in April, while revised data showed existing home sales in April were unchanged at a rate of 5.21 million. The report said the median existing home price for all housing types was \$277,700 in May, up 4% from April and up 4.8% from in May of 2018. Total housing inventory increased to 1.92 million existing homes available for sale at the end of May, representing 4.3 months of supply at the current sales pace. NAR said single-family home sales rose by 2.6% to an annual rate of 4.75 million. Euro area private sector expanded at the fastest pace in seven months in June, as growth in the service sector offset the fall in manufacturing, flash survey data from IHS Markit showed. The composite output index rose to a 7-month high of 52.1 in June from 51.8 a month ago. The reading puts growth in the second quarter up slightly on that seen in the first quarter, yet still the second-lowest since the fourth quarter of 2014. The services Purchasing Managers' Index climbed to 53.4 in June from 52.9 in the previous month. The manufacturing PMI came in at 47.8 in June versus 47.7 a month ago. Japan's manufacturing activity deteriorated further in June on weak orders. The flash manufacturing Purchasing Managers' Index, or PMI, fell to 49.5 in June from 49.8 in May. Any reading below 50 indicates contraction in the sector.

Global Equities: The US stocks saw a choppy session on Friday. Buying was thin the S&P 500 ended the previous session at a record closing high.

Indian Economy: The Goods and Services Tax Council introduced more stringent norms to check tax evasion and extended the tenure of the National Anti-Profiteering Authority (NAA) by two years to November 2021. The council also decided that Aadhaar-based GST identification will now be sufficient for GST registration. During Q4 of FY19, the Central Government issued dated securities worth Rs 156000 crore as against Rs 67000 crore in Q4 of FY18. The weighted average maturity (WAM) of new issuances stood at 14.18 years in Q4 of FY19 (14.70 years in Q3 of FY 19). The weighted average yield (WAY) of issuances for the same quarter was 7.47% compared to 7.82% in Q3 of FY 19. India's foreign exchange reserves declined by US\$ 1.35 billion to US\$ 422.20 billion in the week ended 14 June 2019. The foreign exchange reserves had stood at US\$ 423.55 a week ago.

Equity Markets: Local stocks eased on Friday, as rising crude oil prices, which hit a three week high overshadowed investor euphoria surrounding the US Fed's hints at future rate cuts. The barometer index, the S&P BSE Sensex, fell 407.14 points or 1.03% to 39,194.49. The Nifty 50 index fell 107.65 points or 0.91% to 11,724.10.

Corporate News: MBL Infrastructures has received completion certificate for Project of Construction of 96 flats {Basement + Ground + 12 storey}, Tulsi Tower, Tulsi Nagar, Bhopal, Madhya Pradesh for M P Hosing & Infrastructure Development Board. Neuland Laboratories announced that the US FDA inspected its Unit 1 manufacturing facility at Bonthapally, Hyderabad from 17 to 21 June 2019. The inspection has been completed with five observations given under form 483. The company has already initiated corrective and preventive actions for the observations and is confident of satisfying the FDA within the stipulated time. Government think tank NITI-Aayog has told the two-wheeler industry to get ready for conversion to electric vehicles (EVs) as the government has indicated mandating electric three-wheelers and two-wheelers from 2023 and 2025 respectively.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(25.8)	(1.3)	80.1
MF(INR cr)	1,073.9	221.2	63.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,028	31,961	34,485
F&O(INR cr)	779,766	1,375,021	1,224,582

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	15.4	15.9	15.2
NSE VIX	14.6	14.7	20.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,628	(0.5) %	1.0 %	Energy	15,951	(0.8) %	(3.5) %
IT	16,189	(0.8) %	2.2 %	Pharma	7,912	(1.5) %	(15.6) %
Metals	2,930	(0.3) %	(5.5) %	Finance	13,323	(0.9) %	6.6 %
Auto	7,868	(1.2) %	(6.5) %	PSU	3,086	0.7 %	(8.8) %
FMCG	29,424	(0.8) %	(2.5) %	Real Estate	274	(0.5) %	2.6 %

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>
HDFC AMC	1,872	2.8 %	20.3 %	Oracle Fin	3,099	(4.5) %	(8.6) %
NMDC	111	2.6 %	5.6 %	Yes Bank	110	(4.3) %	(60.3) %
ICICI Pru	384	2.5 %	5.8 %	Aurobindo	602	(3.9) %	(24.0) %
UPL	890	2.3 %	(4.7) %	Divi's Lab	1,546	(3.6) %	(10.3) %
Vodafone I	12	2.1 %	(31.5) %	Cadila Hea	235	(3.1) %	(31.7) %

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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