



24 Aug.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,590	0.1 %	13.5 %
BSE SENSEX	38,337	0.1 %	15.4 %
CNX BANK	28,051	0.1 %	15.3 %
CNX MIDCAP	19,598	(0.0) %	2.6 %
CNX SMALLCAP	7,571	0.2 %	(4.5) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,657	(0.3) %	3.4 %
S&P 500	2,857	(0.2) %	6.0 %
FTSE 100	7,563	(0.2) %	(1.1) %
HANG SENG	27,790	(0.5) %	(8.9) %
NIKKEI	22,411	0.2 %	(4.7) %
SHANGHAI COMPOSITE	2,725	0.4 %	(18.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.11	0.4 %	10.1 %
EUR/USD	1.15	(0.2) %	(3.9) %
GBP/USD	1.28	(0.8) %	(5.2) %
USD/JPY	111.41	1.0 %	(1.2) %
USD/AUD	1.38	1.4 %	7.8 %
USD/SGD	1.37	0.5 %	2.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(0.0) %	12.4 %
Gold(INR/10g)	29,530	0.0 %	0.6 %
Gold Comex(USD/oz)	1,193	(0.3) %	(8.8) %
SILVER(INR/1Kg)	36,556	(1.2) %	(5.3) %
Aluminium(USD/MT)	2,022	(0.8) %	(10.4) %
Copper(USD/MT)	5,911	(1.5) %	(17.7) %

**FIXED INCOME**

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

**Global Economy:** Eurozone composite output index rose marginally to 54.4 in August from 54.3 in July, flash data from IHS Markit showed Thursday. The services Purchasing Managers' Index also came in at 54.4, up from 54.2 a month ago. Meanwhile, the manufacturing PMI fell to a 21-month low of 54.6 from 55.1 in July. Germany's private sector activity grew at the fastest pace in six months in August, flash data from IHS Markit showed. The composite output index improved to 55.7 in August from 55.0 in July. This was the highest reading since February. The services Purchasing Managers' Index rose to 55.2 from 54.1 in July. Japanese manufacturing activity grew at a slightly faster pace in August as domestic demand jumped, a preliminary survey showed. The flash Markit/Nikkei Japan Manufacturing Purchasing Managers Index (PMI) rose to 52.5 in August on a seasonally adjusted basis from a final 52.3 in July.

**Global Equities:** Sentiments were cautious as markets eyed fresh US tariffs on China amid a slide in global copper price.

**Indian Economy:** The Indian economy is expected to grow by around 7.5% in 2018 and 2019 as it is largely resilient to external pressures like those from higher oil prices, Moody's Investors Service said yesterday. In its Global Macro Outlook for 2018-19, Moody's said the run-up in energy prices over the last few months will raise headline inflation temporarily but the growth story remains intact as it is supported by strong urban and rural demand and improved industrial activity.

**Equity Markets:** Selling pressure in banks, metals and auto weighed on the domestic markets yesterday. The local benchmarks started the session on a positive note and hit fresh highs in early trades before ending the day on a subdued note. Domestic investors refrained from taking big positions amid escalating trade war tensions and as crude oil prices soared overnight.

**Corporate News:** Reliance Industries could stay in focus after hitting a market capitalization of Rs 8 lakh crore- the first Indian company to achieve it. The stock tested a fresh record high yesterday. Mahindra Lifespace Developers announced its fifth housing project at the 1,500-acre integrated green township 'Mahindra World City' in Chennai. Metal counter can stay under continued pressure on the heavy correction in global Copper prices.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	61.2	8.5	(24.9)
MF(INR cr)	(44.6)	117.1	378.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	41,378	35,968	33,468
F&O(INR cr)	711,443	919,863	877,396

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.5	14.4
NSE VIX	12.8	12.8	13.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,028	(0.8) %	15.2 %	Energy	15,799	1.1 %	18.9 %
IT	15,322	1.2 %	20.6 %	Pharma	10,077	1.3 %	16.9 %
Metals	3,417	(1.4) %	(3.5) %	Finance	11,625	(0.7) %	13.3 %
Auto	10,960	(0.2) %	(0.9) %	PSU	3,238	(1.2) %	13.4 %
FMCG	32,600	0.9 %	23.0 %	Real Estate	274	0.4 %	(7.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Dabur Indi	484	5.5 %	44.1 %	Tata Motor	257	(4.4) %	(24.3) %
Marico	382	5.4 %	16.3 %	Motherson	302	(3.2) %	(6.6) %
A B B	1,329	4.7 %	2.8 %	B P C L	358	(3.0) %	(15.5) %
United Spi	644	3.5 %	(1.4) %	Tata Motor	140	(3.0) %	(25.9) %
Aurobindo	683	3.1 %	15.2 %	P & G Hygi	10,377	(2.9) %	10.5 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
German Capital Investment (2Q)	24-08-2018	06:00	EUR	-	0.017
German Construction Investment (2Q)	24-08-2018	06:00	EUR	-	0.021
German Domestic Demand (2Q)	24-08-2018	06:00	EUR	-	0.004
German Exports (2Q)	24-08-2018	06:00	EUR	-	(0.01)
German Government Spending (2Q)	24-08-2018	06:00	EUR	-	(0.005)
German Gross Domestic Product n.s.a. (YoY) (2Q F)	24-08-2018	06:00	EUR	-	-
German Gross Domestic Product s.a. (QoQ) (2Q F)	24-08-2018	06:00	EUR	-	-
German Gross Domestic Product w.d.a. (YoY) (2Q F)	24-08-2018	06:00	EUR	-	-
German Imports (2Q)	24-08-2018	06:00	EUR	-	(0.011)
German Private Consumption (2Q)	24-08-2018	06:00	EUR	-	0.004
BBA Loans for House Purchase (JUL)	24-08-2018	08:30	GBP	-	40541
Corporate Service Price (YoY) (JUL)	24-08-2018	00:50	JPY	-	0.012
BOJ Outright Bond Purchase 1~3 Years	24-08-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	24-08-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	24-08-2018	01:10	JPY	-	-
Economic Activity IGAE (YoY) (JUN)	24-08-2018	13:00	MXN	-	0.0223
GDP NSA (YoY) (2Q F)	24-08-2018	13:00	MXN	-	0.027
GDP SA (QoQ) (2Q F)	24-08-2018	13:00	MXN	-	(0.001)
Cap Goods Orders Nondef Ex Air (JUL P)	24-08-2018	12:30	USD	-	0.002
Cap Goods Ship Nondef Ex Air (JUL P)	24-08-2018	12:30	USD	-	0.007
Durable Goods Orders (JUL P)	24-08-2018	12:30	USD	-	0.008
Durables Ex Transportation (JUL P)	24-08-2018	12:30	USD	-	0.002
Fed Hosts Annual Jackson Hole Central Banking Symposium	24-08-2018	13:00	USD	-	-
Powell to Discuss Economy and Monetary Policy at Jackson Hole	24-08-2018	14:00	USD	-	-
Baker Hughes U.S. Rig Count (AUG 24)	24-08-2018	17:00	USD	-	-

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