



24 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,143	0.0 %	9.1 %
BSE SENSEX	36,842	(0.8) %	10.8 %
CNX BANK	25,597	0.0 %	5.2 %
CNX MIDCAP	18,348	0.0 %	(3.9) %
CNX SMALLCAP	6,902	0.0 %	(13.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,744	0.3 %	7.7 %
S&P 500	2,930	(0.0) %	8.7 %
FTSE 100	7,490	1.7 %	(2.1) %
HANG SENG	27,954	1.7 %	(8.4) %
NIKKEI	23,870	0.8 %	1.5 %
SHANGHAI COMPOSITE	2,797	2.5 %	(16.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.20	(0.3) %	13.4 %
EUR/USD	1.17	(0.3) %	(2.2) %
GBP/USD	1.31	(1.5) %	(3.3) %
USD/JPY	112.59	0.1 %	(0.1) %
USD/AUD	1.37	(0.1) %	7.3 %
USD/SGD	1.36	(0.1) %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	(0.0) %	17.2 %
Gold(INR/10g)	30,697	(0.1) %	4.6 %
Gold Comex(USD/oz)	1,204	(0.9) %	(8.0) %
SILVER(INR/1Kg)	36,882	0.5 %	(4.5) %
Aluminium(USD/MT)	2,034	0.8 %	(9.8) %
Copper(USD/MT)	6,203	2.4 %	(13.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

Global Economy: Eurozone private sector grew at the second-weakest pace since late-2016 as manufacturing growth was subdued by stagnating export orders, flash survey data from IHS Markit showed Friday. The composite output index fell to 54.2 in September. Although the reading was well above the 50.0 no-change level, it was the lowest since November 2016 with the exception of last May. The slowdown was driven by weaker growth in the manufacturing sector as export orders failed to grow for the first time since June 2013. Meanwhile, the service sector output growth picked up momentum for a second successive month to reach a three-month high. The manufacturing Purchasing Managers' Index dropped to a 24-month low of 53.3 from 54.6 a month ago.

Global Equities: Markets look broadly supported after last week's rally that took the Dow and the S&P 500 to record highs. Commodity prices also recovered.

Indian Economy: The government will very soon implement the second set of measures including curb on imports of non-essential items to shore up rupee to 68-70 level against the US dollar, Economic Affairs Secretary Subhash Chandra Garg said, according to media reports. The government had earlier this month announced easing of overseas borrowing norms for manufacturing companies, removal of restrictions on foreign portfolio investors (FPI) investment in corporate bonds and tax benefits on Masala bonds to shore up rupee and check widening of current account deficit. Now, the Centre has prepared a list of non-essential items whose imports can be curbed and also drawn up a separate list of goods whose exports can be boosted with a little policy intervention.

Equity Markets: Local stocks are likely to be on an edge following the intensely volatile trading session on Friday. The market crashed last week with huge losses in financial shares. Investors were nervous after US President Donald Trump imposed 10% tariffs on an additional \$200 billion worth of Chinese imports, and warned of duties on more products if China took retaliatory action. Worries that the rupee's woes will prompt foreign investors to pare their holdings also weighed on sentiments. Benchmark indices are near two month low now.

Corporate News: Shares of housing finance companies could see some further pressure after the battering in last session amid continuing financial crisis at IL&FS. Shares of Dewan Housing Finance Corporation (DHFL) would be the key in this regard after a 57% crash in last session. Mahindra & Mahindra (M&M) plans to drive in multiple versions of its entry-level models KUV100 and TUV300, catering to different sets of customers. The Expert Appraisal Committee (EAC) under the Ministry of Environment, Forest and Climate Change, has given the green signal to state-owned ONGC limited for Additional Development Drilling of 72 wells in the Krishna-Godavari basin. Biocon announced that the US FDA conducted a periodic cGMP inspection of the company's Drug Substance manufacturing site at Bangalore Campus from 17-21 September 2018. The weeklong audit concluded without any observations and no Form 483 was issued.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(300.8)	(44.4)	(28.7)
MF(INR cr)	57.1	388.5	367.6

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	71,303	40,178	34,482
F&O(INR cr)	1,333,835	1,246,579	931,581

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	11.7	13.1	14.1
NSE VIX	15.5	14.3	13.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	25,597	(2.6) %	5.2 %	Energy	15,575	0.8 %	17.2 %
IT	15,834	(1.4) %	24.6 %	Pharma	10,252	(2.0) %	18.9 %
Metals	3,673	(0.5) %	3.8 %	Finance	10,858	(1.0) %	5.8 %
Auto	10,407	(1.1) %	(5.9) %	PSU	2,834	(1.6) %	(0.7) %
FMCG	30,407	(0.3) %	14.7 %	Real Estate	249	(3.5) %	(16.1) %

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>
Oil India	219	5.1 %	(3.7) %	Yes Bank	227	(29.0) %	(26.0) %
Bharti Inf	281	3.8 %	(16.7) %	Indiabulls	1,062	(8.4) %	(14.6) %
Container	644	3.5 %	3.7 %	Punjab Nat	73	(8.1) %	(24.4) %
General In	353	3.4 %	(4.5) %	Rural Elec	106	(6.3) %	(16.9) %
Interglobe	897	3.3 %	(32.5) %	Motherson	276	(5.5) %	(14.8) %

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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