



24 Sep.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,600	2.9 %	(0.6) %
BSE SENSEX	39,090	2.8 %	0.6 %
CNX BANK	30,566	5.5 %	0.8 %
CNX MIDCAP	16,745	2.5 %	(8.7) %
CNX SMALLCAP	5,827	3.3 %	(13.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,950	0.1 %	15.5 %
S&P 500	2,992	(0.0) %	19.3 %
FTSE 100	7,326	(0.3) %	8.8 %
HANG SENG	26,222	(0.8) %	4.3 %
NIKKEI	22,079	0.2 %	12.9 %
SHANGHAI COMPOSITE	2,977	(1.0) %	20.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.73	(0.6) %	1.9 %
EUR/USD	1.10	(0.5) %	(4.0) %
GBP/USD	1.24	(0.3) %	(2.4) %
USD/JPY	107.56	(0.6) %	(1.9) %
USD/AUD	1.48	1.0 %	3.9 %
USD/SGD	1.38	0.2 %	0.9 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.6 %	25.6 %
Gold(INR/10g)	37,743	0.9 %	19.7 %
Gold Comex(USD/oz)	1,528	0.2 %	18.3 %
SILVER(INR/1Kg)	46,800	2.4 %	22.3 %
Aluminium(USD/MT)	1,756	(0.6) %	(5.5) %
Copper(USD/MT)	5,695	(1.4) %	(2.5) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

**Global Economy:** Euro area private sector flash composite output index fell to 50.4 in September from 51.9 in August, survey data from IHS Markit showed Monday. A score above 50 indicates expansion in the sector. The reading signaled the weakest growth across manufacturing and services since June 2013. The Purchasing Manager's Index (PMI) for services fell to 52.0 from 53.5 in August. The manufacturing PMI declined to 45.6 from 47.0 in August, moving into further negative territory. Germany private sector output fell for the first time since April 2013, the rate of decline hitting the steepest since October 2012. Germany's flash composite PMI declined to 49.1 from 51.7 in August. The services PMI came in at a 9-month low of 52.5 versus 54.8 a month ago. The factory PMI plunged to a 123-month low of 41.4 compared to 43.5 in August. Australia's private sector returned to positive territory in September, survey data from IHS Markit showed on Monday. The Commonwealth Bank of Australia flash composite output index rose to 51.9 in September from 49.3 in August.

**Global Equities:** European stocks saw heavy selling in early moves on weak economic outlook. Sentiment turned further weak after British tour operator Thomas Cook announced it had collapsed as the firm was unable to secure a rescue package from its lenders.

**Indian Economy:** As per First Advance Estimates for 2019-20 (Kharif Only), total foodgrain production in the country is estimated at 140.57 million tonnes. The production during 2019-20 is higher by 8.44 million tonnes (MT) than the average foodgrain production of previous five years' (2013-14 to 2017-18). Government has set a foodgrain target of 291.1 million tonnes (MT) for 2019-20. It is 6 million tones more than last year, media reports noted. India's foodgrains output in 2018-19 was 284.95 million tonnes. As per the targets set, projected production of coarse cereals would be 48.3 MT as against expected 42.95 MT in 2018-19 and that of pulses 26.30 MT (23.40 million tonnes in 2018-19). According to a latest update from the Reserve Bank Of India, in order to boost credit to export sector, it has been decided to enhance the sanctioned limit, for classification of export credit under priority sector lending, from Rs 25 crore per borrower to Rs 40 crore per borrower. The bank has also decided to remove the existing criteria of 'units having turnover of up to Rs 100 crore.

**Equity Markets:** Domestic stock market added to the historic gains made on Friday after Finance Minister Nirmala Sitharaman delivered a surprise cut in corporate tax rates. The surprise decision by the government is seen boosting corporate earnings significantly. S&P BSE Sensex rose 1075.41 points or 2.83% to 39,090.03, as per the provisional closing data. The Nifty 50 index rose 329.20 points or 2.92% to 11,603.40, as per the provisional closing data.

**Corporate News:** Wipro Limited announced the successful launch of the first phase of noomis TM, the new online platform of FEBRABAN, an industry association that represents the financial services sector in Brazil. Tata Power decommissioned 'Unit 6' of 500 megawatts at its Trombay thermal power plant in Mumbai, citing the high cost of generation and its inability to get a power purchase agreement after the earlier one expired in March 2018. ICICI Bank said it will expand its retail network by adding 450 new branches this financial year. Of these, the bank has made 320 branches operational for customers and in the process, it has crossed the milestone of having 5,000 branches, ICICI Bank said in a statement.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	83.5	(59.3)	(3.5)
MF(INR cr)	1,212.6	640.9	410.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	68,847	38,643	34,980
F&O(INR cr)	1,431,999	1,499,131	1,315,647

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.9	15.7	15.5
NSE VIX	16.8	15.9	17.5

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,566	5.5 %	0.8 %	Energy	15,000	0.9 %	(9.3) %
IT	15,041	(2.9) %	(5.1) %	Pharma	7,857	(1.6) %	(16.2) %
Metals	2,526	1.1 %	(18.6) %	Finance	13,560	5.4 %	8.5 %
Auto	7,803	2.6 %	(7.3) %	PSU	2,583	2.4 %	(23.7) %
FMCG	31,120	4.3 %	3.1 %	Real Estate	273	2.8 %	2.1 %

### 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>
B P C L	451	11.6 %	15.0 %	Zee Entert	272	(9.9) %	(37.1) %
A B B	1,553	10.2 %	17.9 %	Oracle Fin	2,999	(5.3) %	(11.5) %
Bajaj Hold	3,538	9.4 %	5.5 %	Petronet L	253	(5.1) %	2.2 %
Colgate-Pa	1,521	8.9 %	20.9 %	Infosys	764	(5.0) %	1.2 %
Avenue Sup	1,917	8.8 %	28.4 %	Vodafone I	6	(4.3) %	(68.5) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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