



24 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,278	1.3 %	0.6 %
BSE SENSEX	33,847	(0.8) %	2.8 %
CNX BANK	25,313	1.4 %	4.0 %
CNX MIDCAP	16,303	0.8 %	(14.6) %
CNX SMALLCAP	5,865	1.1 %	(26.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,191	(0.5) %	1.5 %
S&P 500	2,741	(0.6) %	1.7 %
FTSE 100	6,955	(1.2) %	(9.1) %
HANG SENG	25,347	(3.1) %	(16.9) %
NIKKEI	22,011	(2.7) %	(6.4) %
SHANGHAI COMPOSITE	2,595	(2.3) %	(22.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.57	0.3 %	15.5 %
EUR/USD	1.15	(0.4) %	(4.6) %
GBP/USD	1.30	(0.8) %	(4.0) %
USD/JPY	112.49	(0.1) %	(0.2) %
USD/AUD	1.41	0.4 %	10.3 %
USD/SGD	1.38	0.0 %	3.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(4.0) %	10.0 %
Gold(INR/10g)	31,909	1.0 %	8.7 %
Gold Comex(USD/oz)	1,235	0.7 %	(5.6) %
SILVER(INR/1Kg)	38,563	0.6 %	(0.1) %
Aluminium(USD/MT)	1,997	(0.3) %	(11.5) %
Copper(USD/MT)	6,168	(1.9) %	(14.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	(0.0) %	0.7 %

Global Economy: Global crude oil prices fell near six week low, extending a recent downturn after Saudi Arabia said it would play a responsible role in energy markets, according to media reports. German producer prices grew 3.2% year-on-year in September, after rising 3.1% in the previous month, figures from Destatis showed Tuesday. The inflation rate was the highest since September 2017, when prices advanced 3.2%. On a month-on-month basis, producer prices rose by 0.5% after a 0.3% increase in August.

Global Equities: Stocks extended declines as diplomatic tensions in Saudi Arabia, concerns over Italy's Budget and ongoing Brexit talks all depressed the sentiments.

Indian Economy: India's Crude oil production during September, 2018 was 2797.84 TMT which is 6.59% lower than target and 4.19% lower when compared with September, 2017. Cumulative crude oil production during April-September, 2018 was 17409.44 TMT which is 4.05% lower than target for the period and 3.42% lower than production during corresponding period of last year. Natural gas production during September, 2018 was 2684.20 MMSCM which is 7.56% lower than the target for the month and 1.43% lower when compared with September, 2017. Cumulative natural gas production during April-September, 2018 was 16254.65 MMSCM which is 7.75% lower than target for the period but 0.96% lower than the production during corresponding period of last year.

Equity Markets: The selling pressure is refusing to let go of the local stocks. The market extended losses for fourth session in a row dragged by weakness in IT and pharma stocks. Weak global stocks dampened sentiment on the domestic bourses. The Sensex settled well below the psychological 34,000 level after gyrating above and below that level in intraday trade.

Corporate News: Bajaj Finserv reported net Sales at Rs 9,698.14 crore in September 2018 Up 28.26% from Rs 7,561.04 crore in September 2017. Quarterly net profit was Rs 704.01 crore in September 2018 Up 7.93% while EBITDA stood at Rs 3,402.95 crore, Up 30.61% on year. HDFC Standard Life Insurance Company reported net Sales at Rs 307.38 crore in September 2018 up 20.61% from Rs 254.86 crore in September 2017. Quarterly net profit was at Rs. 286.98 crore, up 20.33% while EBITDA was Rs. 296.32 crore, up 21%. HCL Technologies reported 16.10% year-on-year rise in profit at Rs 2,540 crore in September 2018. The company sees FY19 revenue growth at 9.5-11.50% in constant currency terms.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(60.5)	(186.2)	(49.1)
MF(INR cr)	812.4	978.5	462.9

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,023	38,640	35,334
F&O(INR cr)	982,263	1,089,225	969,625

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.6	18.0	14.5
NSE VIX	19.0	19.0	14.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,972	(0.4) %	2.6 %	Energy	13,612	(0.4) %	2.4 %
IT	14,015	(2.8) %	10.3 %	Pharma	9,368	(2.9) %	8.7 %
Metals	3,313	(0.8) %	(6.4) %	Finance	10,322	(0.1) %	0.6 %
Auto	8,649	(0.6) %	(21.8) %	PSU	2,629	(1.6) %	(7.9) %
FMCG	28,481	(1.1) %	7.5 %	Real Estate	204	0.2 %	(31.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SBI Life I	579	3.9 %	(15.3) %	Biocon	626	(7.2) %	4.5 %
H P C L	218	3.5 %	(36.7) %	Asian Pain	1,138	(5.2) %	(1.0) %
Indiabulls	735	3.0 %	(40.9) %	Sun Pharma	576	(5.1) %	13.4 %
Bharat Ele	87	2.8 %	(39.9) %	Pidilite I	924	(5.0) %	(1.9) %
ICICI Pru	324	2.3 %	(15.8) %	Avenue Sup	1,134	(4.9) %	(16.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (SEP)	24-10-2018	00:00	AUD	-	0.006
Bank of Canada Rate Decision (OCT 24)	24-10-2018	14:00	CAD	-	0.015
Markit France Composite PMI (OCT P)	24-10-2018	07:15	EUR	-	54
Markit France Manufacturing PMI (OCT P)	24-10-2018	07:15	EUR	-	52.5
Markit France Services PMI (OCT P)	24-10-2018	07:15	EUR	-	54.8
Markit Germany Services PMI (OCT P)	24-10-2018	07:30	EUR	-	55.9
Markit/BME Germany Composite PMI (OCT P)	24-10-2018	07:30	EUR	-	55
Markit/BME Germany Manufacturing PMI (OCT P)	24-10-2018	07:30	EUR	-	53.7
Euro-Zone M3 Money Supply (YoY) (SEP)	24-10-2018	08:00	EUR	-	0.035
Markit Eurozone Composite PMI (OCT P)	24-10-2018	08:00	EUR	-	54.1
Markit Eurozone Manufacturing PMI (OCT P)	24-10-2018	08:00	EUR	-	53.2
Markit Eurozone Services PMI (OCT P)	24-10-2018	08:00	EUR	-	54.7
BBA Loans for House Purchase (SEP)	24-10-2018	08:30	GBP	-	39402
BOJ Outright Bond Purchase 10~25 Years	24-10-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	24-10-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	24-10-2018	01:10	JPY	-	-
Coincident Index (AUG F)	24-10-2018	05:00	JPY	-	117.5
Leading Index CI (AUG F)	24-10-2018	05:00	JPY	-	104.4
Corporate Service Price (YoY) (SEP)	24-10-2018	23:50	JPY	-	0.013
Foreign Buying Japan Bonds (OCT 19)	24-10-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (OCT 19)	24-10-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (OCT 19)	24-10-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (OCT 19)	24-10-2018	23:50	JPY	-	-
Bi-Weekly Consumer Price Index (MoM) (OCT 15)	24-10-2018	13:00	MXN	-	0.001
Bi-Weekly Consumer Price Index (YoY) (OCT 15)	24-10-2018	13:00	MXN	-	0.0517
Bi-Weekly Core Consumer Price Index (OCT 15)	24-10-2018	13:00	MXN	-	0.0018
Exports (SEP)	24-10-2018	21:45	NZD	-	-
Imports (SEP)	24-10-2018	21:45	NZD	-	-
Treasury Bill (SEP)	24-10-2018	21:45	NZD	-	-



Trade Balance 12 Mth YTD (SEP)	24-10-2018	21:45	NZD	-	-
Fed's George Takes Part in Payment System Conference in Sydney	24-10-2018	00:00	USD	-	-
MBA Mortgage Applications (OCT 19)	24-10-2018	11:00	USD	-	(0.071)
House Price Index (MoM) (AUG)	24-10-2018	13:00	USD	-	0.002
Markit US Composite PMI (OCT P)	24-10-2018	13:45	USD	-	53.9
Markit US Manufacturing PMI (OCT P)	24-10-2018	13:45	USD	-	55.6
Markit US Services PMI (OCT P)	24-10-2018	13:45	USD	-	53.5
New Home Sales (MoM) (SEP)	24-10-2018	14:00	USD	-	0.035
New Home Sales (SEP)	24-10-2018	14:00	USD	-	-
DOE Cushing OK Crude Inventory (OCT 19)	24-10-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (OCT 19)	24-10-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (OCT 19)	24-10-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (OCT 19)	24-10-2018	14:30	USD	-	-
2Y FRN Yield Rate (OCT 24)	24-10-2018	15:30	USD	-	0.0005
U.S. to Sell USD19 Bln 2-Year Floating Rate Notes	24-10-2018	15:30	USD	-	-
Atlanta Fed's Bostic Speaks at Energy Summit in Baton Rouge	24-10-2018	17:00	USD	-	-
U.S. to Sell USD39 Bln 5-Year Notes	24-10-2018	17:00	USD	-	-
Fed's Mester Speaks at Forecasters Club in New York	24-10-2018	17:10	USD	-	-
U.S. Federal Reserve Releases Beige Book	24-10-2018	18:00	USD	-	-
Fed's Brainard Speaks at Event on Economic/Financial Literacy	24-10-2018	23:00	USD	-	-

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