



25 Jun.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|-------|---------|
| CNX NIFTY | 10,822 | 0.8 % | 6.0 % |
| BSE SENSEX | 35,690 | 0.7 % | 7.3 % |
| CNX BANK | 26,767 | 1.0 % | 10.0 % |
| CNX MIDCAP | 18,596 | 0.5 % | (2.6) % |
| CNX SMALLCAP | 7,433 | 0.2 % | (6.3) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| DOW JONES | 24,581 | 0.5 % | (1.0) % |
| S&P 500 | 2,755 | 0.2 % | 2.2 % |
| FTSE 100 | 7,682 | 1.7 % | 0.4 % |
| HANG SENG | 29,339 | 0.2 % | (3.9) % |
| NIKKEI | 22,517 | (0.8) % | (4.2) % |
| SHANGHAI COMPOSITE | 2,890 | 0.5 % | (13.7) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 67.83 | (0.2) % | 6.5 % |
| EUR/USD | 1.17 | 0.4 % | (3.0) % |
| GBP/USD | 1.33 | 0.0 % | (1.9) % |
| USD/JPY | 109.97 | (0.1) % | (2.4) % |
| USD/AUD | 1.34 | (0.8) % | 5.1 % |
| USD/SGD | 1.36 | 0.0 % | 1.8 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 69 | 4.6 % | 13.6 % |
| Gold(INR/10g) | 30,484 | 0.2 % | 3.8 % |
| Gold Comex(USD/oz) | 1,271 | 0.1 % | (2.9) % |
| SILVER(INR/1Kg) | 39,626 | 0.6 % | 2.6 % |
| Aluminium(USD/MT) | 2,166 | (0.0) % | (4.0) % |
| Copper(USD/MT) | 6,811 | 0.1 % | (5.2) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|---------|---------|
| 10 Y GSec US 10 | 2.9 | (0.0) % | 0.4 % |

Global Economy: Euro area composite output index rose unexpectedly to 54.8 in June from 54.1 in May, flash data from IHS Markit showed Friday. While an improvement was reported from the 18-month low seen in May, the June reading represented the second-weakest expansion seen over the past 17 months. The services PMI rose to 55.0 in June from 53.8 in May. Meanwhile, the factory PMI fell to 55.0 in June from 55.5 in the previous month. Japan's all industry activity index climbed 1% month-over-month in April, after remaining flat in March, data from the Ministry of Economy, Trade and Industry showed. Industrial production expanded 0.5% over the month and construction activity index grew by 2.5% and tertiary activity registered an increase of 1%. On a yearly basis, all industry activity growth improved to 1.5% in April from 1.2% in the prior month.

Global Equities: Modest gains emerged in US stocks after recent losses. A sharp rally by energy stocks contributed to the strength on Wall Street.

Indian Economy: The water storage available in 91 major reservoirs of the country for the week ending on June 21, 2018 was 29.668 BCM which is 18% of total storage capacity of these reservoirs. This percentage was at the same level for the week ending on June 14, 2018. The level of water storage in the week ending on June 21, 2018 was 101% of the storage of corresponding period of last year and 99% of storage of average of last ten years. The total storage capacity of these 91 reservoirs is 161.993 BCM which is about 63% of the total storage capacity of 257.812 BCM which is estimated to have been created in the country. 37 Reservoirs out of these 91 have hydropower benefit with installed capacity of more than 60 MW.

Equity Markets: Trading for the week ended on a buoyant note as the key benchmark indices logged modest gains amid high intraday volatility. Index heavyweights HDFC, HDFC Bank and ITC gained. Index heavyweight Reliance Industries dropped. Most pharma shares rose. Domestic stocks edged lower in early trade on negative Asian stocks. Volatility struck bourses in morning trade as the key benchmark once again dipped in negative zone after staging an intraday recovery.

Corporate News: A massive spurt in Crude oil prices on Friday is likely to weigh on local oil marketing counters today. Brent Crude hovers around \$74 mark in Asia. Biocon announced that has received an Establishment Inspection Report (EIR) from the US Food and Drug Administration (USFDA) for its sterile drug product manufacturing facility in Bengaluru, following the USFDA pre-approval inspection of this facility in April/ May 2018. EIR notified that the inspection stands closed. Symphony announced that it has signed an agreement to effectively purchase 95% equity stake in Climate Technologies, Australia's leading manufacturer of cooling and heating appliances. The acquisition will be executed at a valuation range of 40-44 million Australian dollars (Rs 201 - 221 crore) depending on the achievement of FY18F EBITDA (June ended).



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | 191.6 | (47.3) | (53.8) |
| MF(INR cr) | 616.3 | 386.5 | 492.5 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 29,795 | 29,188 | 33,129 |
| F&O(INR cr) | 712,492 | 829,122 | 817,428 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 13.8 | 12.7 | 15.1 |
| NSE VIX | 12.0 | 12.7 | 13.5 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 26,767 | 1.0 % | 10.0 % | Energy | 13,948 | (0.8) % | 4.9 % |
| IT | 13,777 | 0.0 % | 8.4 % | Pharma | 9,361 | 1.8 % | 8.6 % |
| Metals | 3,432 | 0.3 % | (3.1) % | Finance | 11,214 | 1.5 % | 9.3 % |
| Auto | 11,089 | 0.5 % | 0.3 % | PSU | 2,948 | 1.2 % | 3.3 % |
| FMCG | 28,631 | 1.1 % | 8.0 % | Real Estate | 282 | 0.2 % | (4.8) % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| United Spi | 681 | 4.2 % | 4.3 % | Reliance I | 1,013 | (1.9) % | 13.4 % |
| Sun Pharma | 577 | 4.1 % | 13.7 % | Punjab Nat | 82 | (1.8) % | (15.0) % |
| Ambuja Cem | 205 | 4.0 % | (14.7) % | Cummins In | 669 | (1.5) % | (6.6) % |
| Bajaj Fin. | 2,336 | 3.5 % | 28.5 % | H P C L | 311 | (1.3) % | (9.7) % |
| Bajaj Fins | 6,177 | 3.1 % | 17.3 % | Coal India | 265 | (1.1) % | (4.6) % |

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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