



25 Jun.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,700	0.0 %	0.3 %
BSE SENSEX	39,123	(0.2) %	0.6 %
CNX BANK	30,602	0.0 %	0.9 %
CNX MIDCAP	17,353	0.0 %	(5.3) %
CNX SMALLCAP	6,122	0.0 %	(9.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,728	0.0 %	14.6 %
S&P 500	2,945	(0.2) %	17.5 %
FTSE 100	7,417	0.1 %	10.1 %
HANG SENG	28,513	0.1 %	13.5 %
NIKKEI	21,286	0.1 %	8.8 %
SHANGHAI COMPOSITE	3,008	0.2 %	22.0 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	69.43	(0.2) %	0.0 %
EUR/USD	1.14	1.4 %	(0.7) %
GBP/USD	1.27	1.1 %	(0.1) %
USD/JPY	107.35	(0.9) %	(2.1) %
USD/AUD	1.44	(0.7) %	1.6 %
USD/SGD	1.36	(0.8) %	(0.7) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	1.2 %	24.4 %
Gold(INR/10g)	34,041	0.4 %	8.0 %
Gold Comex(USD/oz)	1,424	1.8 %	10.3 %
SILVER(INR/1Kg)	37,916	0.1 %	(0.9) %
Aluminium(USD/MT)	1,748	0.2 %	(5.9) %
Copper(USD/MT)	5,917	(0.4) %	1.3 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	(0.1) %	(0.6) %

**Global Economy:** The US President Donald Trump signed an executive order imposing financial sanctions on Iranian leaders, according to media reports. Germany's business sentiment weakened in June, survey data from the Munich-based Ifo Institute revealed. The ifo business confidence index fell to 97.4 in June from 97.9 in May. The current conditions index edged up marginally to 100.8 from May's initial reading was 100.6. The expectations index fell to 94.2 in June from May's originally estimated 95.3. WTO Secretariat circulates a meeting notice and list of items proposed for the next meeting of the Dispute Settlement Body, which consists of all WTO members and oversees legal disputes among them. Singapore's consumer price inflation accelerates in May on accommodation and private road transport costs. The consumer price index rose 0.9% year-on-year in May from April's 0.8%

**Global Equities:** Markets stayed tepid amid rising tensions between the US and Iran. Traders also maintained caution ahead of this week's G20 meeting in Japan.

**Indian Economy:** FICCI's latest quarterly survey on Manufacturing portrays a moderation of outlook for the manufacturing sector in Q-1 (April-June 2019-20) as the percentage of respondents reporting higher production in first quarter has fallen vis-a-vis the Q-4 of 2018-19. Overall sentiments in manufacturing remains subdued as the proportion of respondents reporting higher output growth during the April-June 2019 has fallen to 41% as compared to Q-4 of 2018-19 (54%). Viral Acharya, Deputy Governor of the Reserve Bank of India (RBI) has resigned from his post role six months before the end of his tenure. As per latest data of the Agriculture Ministry on 22nd June, kharif sowing declined by more than 12%. The total area covered till the end of the current week was around 91 lakh hectares (lh) against 104 lh in the corresponding week of the previous kharif season. As per latest data by Securities Exchange Board Of India (SEBI), the total value of Participatory Notes (PNs) investments in the Indian capital markets edged up to Rs 82619 crore till May, rising around 1400 crore from Rs 81220 crore at the end of April 2019.

**Equity Markets:** Local equity market declined on Monday as investors were caution on concerns of higher crude oil prices and a deficient monsoon in India. The key barometer, the S&P BSE Sensex, fell 71.53 points or 0.18% to 39,122.96. The Nifty 50 index fell 24.45 points or 0.21% to 11,699.65. As per monsoon data, of the 36 meteorological subdivisions, 25% have recorded "deficient" rainfall, while six subdivisions recorded precipitation classified under the "large deficient" category. The overall monsoon deficiency is recorded 38% till June 23.

**Corporate News:** Infosys announced a long term strategic partnership with Toyota Material Handling Europe (TMHE). As IT services partner, Infosys will help TMHE in its digital transformation journey by facilitating transformation to a scalable digital hybrid cloud platform, providing application services, digital workplace, infrastructure management and a dedicated data center operation. Tata Consultancy Services (TCS) announced that it is increasing its holding in TCS Japan, its joint venture with Mitsubishi Corporation (MC), one of Japan's largest integrated business enterprises. Following the stake hike, TCS will hold 55% equity in TCS Japan - up from 51%, when the joint venture was established in July 2014 - and MC will hold 34%.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(143.9)	(11.5)	76.1
MF(INR cr)	503.5	243.9	72.3

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,527	31,732	34,378
F&O(INR cr)	803,655	1,336,930	1,217,066

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.3	15.8	15.2
NSE VIX	15.2	14.7	20.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,602	(0.1) %	0.9 %	Energy	15,782	(1.1) %	(4.5) %
IT	16,187	(0.0) %	2.2 %	Pharma	7,902	(0.1) %	(15.7) %
Metals	2,892	(1.3) %	(6.8) %	Finance	13,309	(0.1) %	6.5 %
Auto	7,832	(0.5) %	(6.9) %	PSU	3,093	0.3 %	(8.6) %
FMCG	29,464	0.1 %	(2.4) %	Real Estate	272	(1.0) %	1.6 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
UPL	937	5.2 %	0.2 %	Motherson	121	(4.2) %	(21.2) %
HDFC AMC	1,934	3.3 %	24.3 %	JSW Steel	258	(3.5) %	(11.8) %
B H E L	74	3.2 %	(3.0) %	O N G C	165	(3.4) %	5.1 %
Lupin	733	2.8 %	(4.4) %	Eicher Mot	19,098	(3.1) %	(4.7) %
Piramal En	1,943	2.8 %	(27.9) %	Aurobindo	586	(2.7) %	(26.0) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Bullock Gives Speech in Berlin	25-06-2019	07:05	AUD	-	-
Wholesale Trade Sales (MoM) (APR)	25-06-2019	12:30	CAD	-	0.014
CBI Reported Sales (JUN)	25-06-2019	10:00	GBP	-	(27)
CBI Total Dist. Reported Sales (JUN)	25-06-2019	10:00	GBP	-	(20)
Fed's Williams Makes Opening Remarks at Finance Forum	25-06-2019	12:45	USD	-	-
House Price Index (MoM) (APR)	25-06-2019	13:00	USD	-	0.001
S&P CoreLogic CS 20-City (MoM) SA (APR)	25-06-2019	13:00	USD	-	0.0009
S&P/Case-Shiller 20-City Index n.s.a (APR)	25-06-2019	13:00	USD	-	214.09
S&P/Case-Shiller Composite-20 (YoY) (APR)	25-06-2019	13:00	USD	-	0.0268
S&P/Case-Shiller US Home Price Index (APR)	25-06-2019	13:00	USD	-	206.23
S&P/Case-Shiller US Home Price Index (YoY) (APR)	25-06-2019	13:00	USD	-	0.0372
Conf. Board Expectations (JUN)	25-06-2019	14:00	USD	-	106.6
Conf. Board Present Situation (JUN)	25-06-2019	14:00	USD	-	175.2
Consumer Confidence Index (JUN)	25-06-2019	14:00	USD	-	134.1
New Home Sales (MAY)	25-06-2019	14:00	USD	-	-
New Home Sales (MoM) (MAY)	25-06-2019	14:00	USD	-	(0.069)
Revisions: Retail Sales	25-06-2019	14:00	USD	-	-
Richmond Fed Manufact. Index (JUN)	25-06-2019	14:00	USD	-	5
Fed's Bostic Speaks on Housing	25-06-2019	16:00	USD	-	-
Powell Discusses Economic Outlook and Monetary Policy	25-06-2019	17:00	USD	-	-
U.S. to Sell USD40 Bln 2-Year Notes	25-06-2019	17:00	USD	-	-
Fed's Barkin Speaks in Ottawa	25-06-2019	19:30	USD	-	-
Fed's Bullard Gives Welcoming Remarks at Lecture in St. Louis	25-06-2019	22:30	USD	-	-

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