



25 Jul.2018

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,148	0.1 %	9.2 %
BSE SENSEX	36,825	0.3 %	11.0 %
CNX BANK	26,993	0.1 %	11.0 %
CNX MIDCAP	18,549	0.3 %	(2.9) %
CNX SMALLCAP	7,282	0.5 %	(8.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,242	0.8 %	1.7 %
S&P 500	2,820	0.5 %	4.6 %
FTSE 100	7,709	0.7 %	0.8 %
HANG SENG	28,663	1.4 %	(6.1) %
NIKKEI	22,510	0.5 %	(4.2) %
SHANGHAI COMPOSITE	2,906	1.6 %	(13.2) %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.95	0.1 %	8.3 %
EUR/USD	1.17	(0.4) %	(2.8) %
GBP/USD	1.31	0.1 %	(2.7) %
USD/JPY	111.29	(0.1) %	(1.3) %
USD/AUD	1.35	0.1 %	5.6 %
USD/SGD	1.37	0.1 %	2.2 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	(3.6) %	12.5 %
Gold(INR/10g)	29,897	(0.2) %	1.8 %
Gold Comex(USD/oz)	1,231	(0.1) %	(5.9) %
SILVER(INR/1Kg)	38,015	(0.4) %	(1.5) %
Aluminium(USD/MT)	2,130	2.7 %	(5.6) %
Copper(USD/MT)	6,153	1.3 %	(14.3) %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.1 %	0.5 %

**Global Economy:** Eurozone private sector activity growth lost momentum at the start of the third quarter as the improvement in Germany contrasted with a slowdown in France, flash survey results from IHS Markit revealed Tuesday. The composite output index dropped to 54.3 in July from 54.9 in June. The score was expected to fall slightly to 54.8. The reading was the second weakest since November 2016. British manufacturers' new orders continued to increase at a brisk pace with a pick-up in the domestic market offsetting a slight slowdown in new export orders in three months to July, quarterly Industrial Trends Survey from the Confederation of British Industry showed Tuesday.

**Global Equities:** US stocks remained supported amid good earnings.

**Indian Economy:** India's external sector position in 2017/18 is broadly consistent with fundamentals and desirable policy settings. India's low per capita income, favourable growth prospects, demographic trends, and development needs justify running CA deficits. External vulnerabilities remain, although they have been reduced since 2013. India's economic risks stem from more volatile global financial conditions, oil price volatility, and are treat from cross border integration. Progress has been made on FDI liberalization, while portfolio flows remain controlled.

**Equity Markets:** The market gained for the third straight session on Tuesday as cement and auto stocks surged on hopes of improved results. Stocks drifted higher in early trade, with the Sensex scaling record high. Indices held onto gains in morning trade. Key benchmark indices held firm in mid-morning trade. Indices trimmed gains in early afternoon trade as profit booking emerged at higher levels. Stocks turned volatile in afternoon trade. Key benchmark indices once again regained strength in mid-afternoon trade. Indices held firm in late trade.

**Corporate News:** HDFC announced that in the proposed meeting on 30 July 2018, the company's board will consider raising up to \$1.5 billion via external commercial borrowing (ECB). The company had earlier announced that its board will meet on 30 July 2018, to consider Q1 June 2018 results, and approve issuance of secured redeemable non-convertible debentures aggregating to Rs 35000 crore on a private placement basis, subject to approval of shareholders of the corporation. Asian Paints' net profit rose 29.63% to Rs 571.31 crore on 15.07% increase in net sales to Rs 4390.27 crore in Q1 June 2018 over Q1 June 2017. Oil India said it has signed a joint venture agreement at Guwahati on 20 July 2018 in connection with formation of a JV company for construction of North-East Gas Grid Pipeline in the eight North-Eastern States, viz. Assam, Arunachal Pradesh, Meghalaya, Manipur, Mizoram, Nagaland, Tripura and Sikkim. The proposed JV company will have equal equity contribution from all the five PSU JV partners. Hero MotoCorp, L&T and Ambuja Cements will unveil April-June 2018 earnings today, 25 July 2018.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	24.2	(19.1)	(38.7)
MF(INR cr)	(198.5)	367.5	474.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,129	31,141	32,641
F&O(INR cr)	874,238	923,900	855,299

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.6	13.5	14.9
NSE VIX	12.5	12.9	13.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,974	(0.1) %	10.9 %	Energy	14,488	(0.1) %	9.0 %
IT	14,664	(0.1) %	15.4 %	Pharma	9,049	1.2 %	5.0 %
Metals	3,233	3.0 %	(8.7) %	Finance	11,333	0.2 %	10.4 %
Auto	10,861	0.8 %	(1.8) %	PSU	2,896	0.9 %	1.5 %
FMCG	30,026	0.1 %	13.3 %	Real Estate	268	2.5 %	(9.6) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ACC	1,476	12.6 %	(4.0) %	Emami	552	(2.6) %	1.1 %
Grasim Ind	1,000	8.5 %	(8.2) %	Havells In	599	(1.9) %	17.9 %
Power Fin.	77	8.2 %	(12.2) %	Kotak Mah.	1,312	(1.9) %	19.7 %
Aditya Bir	140	7.8 %	(7.8) %	Hero Motoc	3,108	(1.8) %	(14.7) %
Ambuja Cem	213	7.4 %	(11.5) %	Bajaj Fin.	2,713	(1.5) %	49.2 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Skilled Vacancies (MoM) (JUN)	25-07-2018	1:00	AUD	-	(0.009)
Consumer Prices Index (QoQ) (2Q)	25-07-2018	1:30	AUD	-	0.004
Consumer Prices Index (YoY) (2Q)	25-07-2018	1:30	AUD	-	0.019
Consumer Prices Index RBA Weighted Median (QoQ) (2Q)	25-07-2018	1:30	AUD	-	0.005
Consumer Prices Index RBA Weighted Median (YoY) (2Q)	25-07-2018	1:30	AUD	-	0.02
Consumer Prices Index Trimmed Mean (QoQ) (2Q)	25-07-2018	1:30	AUD	-	0.005
Consumer Prices Index Trimmed Mean (YoY) (2Q)	25-07-2018	1:30	AUD	-	0.019
Credit Suisse Survey Expectations (JUL)	25-07-2018	8:00	CHF	-	8
Euro-Zone M3 Money Supply (YoY) (JUN)	25-07-2018	8:00	EUR	-	0.04
German IFO Business Climate (JUL)	25-07-2018	8:00	EUR	-	101.8
German IFO Current Assessment (JUL)	25-07-2018	8:00	EUR	-	105.1
German IFO Expectations (JUL)	25-07-2018	8:00	EUR	-	98.6
CBI Reported Sales (JUL)	25-07-2018	10:00	GBP	-	32
CBI Total Dist. Reported Sales (JUL)	25-07-2018	10:00	GBP	-	18
BBA Loans for House Purchase (JUN)	25-07-2018	8:30	GBP	-	39244
BOJ Outright Bond Purchase 10~25 Years	25-07-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	25-07-2018	1:10	JPY	-	-
Foreign Buying Japan Bonds (JUL 20)	25-07-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUL 20)	25-07-2018	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUL 20)	25-07-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUL 20)	25-07-2018	23:50	JPY	-	-
MBA Mortgage Applications (JUL 20)	25-07-2018	11:00	USD	-	(0.025)
New Home Sales (JUN)	25-07-2018	14:00	USD	-	-
New Home Sales (MoM) (JUN)	25-07-2018	14:00	USD	-	0.067
DOE Cushing OK Crude Inventory (JUL 20)	25-07-2018	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUL 20)	25-07-2018	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUL 20)	25-07-2018	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 20)	25-07-2018	14:30	USD	-	-
U.S. to Call USD18 Billion Foreign Debt Notes Beginning	25-07-2018	15:30	USD	-	-



U.S. to Sell USD36 Bln 5-Year Notes

25-07-2018 17:00

USD

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