



25 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,967	0.0 %	7.4 %
BSE SENSEX	36,305	(1.5) %	9.3 %
CNX BANK	24,970	0.0 %	2.6 %
CNX MIDCAP	17,848	0.0 %	(6.5) %
CNX SMALLCAP	6,722	0.0 %	(15.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,562	(0.7) %	7.0 %
S&P 500	2,919	(0.4) %	8.3 %
FTSE 100	7,458	(0.4) %	(2.5) %
HANG SENG	27,499	(1.6) %	(9.9) %
NIKKEI	23,870	0.8 %	1.5 %
SHANGHAI COMPOSITE	2,797	2.5 %	(16.5) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.63	0.4 %	14.1 %
EUR/USD	1.17	(0.4) %	(2.3) %
GBP/USD	1.31	(1.2) %	(3.0) %
USD/JPY	112.84	0.3 %	0.1 %
USD/AUD	1.38	0.6 %	8.0 %
USD/SGD	1.37	0.1 %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	71	(0.0) %	17.2 %
Gold(INR/10g)	30,664	(0.1) %	4.4 %
Gold Comex(USD/oz)	1,204	(0.9) %	(8.0) %
SILVER(INR/1Kg)	37,077	0.5 %	(4.0) %
Aluminium(USD/MT)	2,034	0.8 %	(9.8) %
Copper(USD/MT)	6,203	2.4 %	(13.6) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	0.0 %	0.6 %

Global Economy: Germany's business confidence weakened slightly in September, survey data from Mannheim-based Ifo institute showed. The business sentiment index fell to 103.7 in September from 103.9 in August from the originally estimated 103.8 in August. The current assessment indicator came in at 106.4 in September versus revised 106.5 a month ago. At the same time, the expectations index came in at 101.0 in September, down from 101.3 in previous month. The UK manufacturing orders deteriorated in September, the Industrial Trends Survey from the Confederation of British Industry showed. The total order book balance fell to -1 percent in three months to September.

Global Equities: Global trade war remained in focus as the latest round of tariffs which target products from both the US and China have now come into effect. The markets in Japan, South Korea and China were closed for public holidays on Monday. Investors are cautious ahead of a US Federal Reserve meet on Tuesday.

Indian Economy: India's Crude oil production during August, 2018 was 2908.12 TMT which is 6.47% lower than target and 3.70% lower when compared with August, 2017. Cumulative crude oil production during April-August, 2018 was 14611.53 TMT which is 3.55% lower than target for the period and 3.27% lower than production during corresponding period of last year. Natural gas production during August, 2018 was 2789.34 MMSCM which is 8.10% lower than the target for the month but 0.59% higher when compared with August, 2017.

Equity Markets: Domestic markets started the week on a fragile note following the hefty damage inflicted by the shares of NBFCs on Friday. The market extended losses to a fifth session on Monday, dragged by financials and automobiles. Global shares declined following renewed uncertainty over US-China trade relations. The Sensex fell 536.58 points or 1.46% to settle at 36,305.02, its lowest closing level since 11 July 2018. The index rose 103.90 points, or 0.28% at the day's high of 36,945.50. The index fell 624.65 points, or 1.70% at the day's low of 36,216.95.

Corporate News: Zensar announced that it has been chosen by Ruffer, a leading UK investment management company to manage its end-to-end infrastructure requirements. Zensar will partner with Ruffer as its technology infrastructure transformation partner to build a responsive, market-ready and customer centric service IT framework. Local Oil Marketing Companies could see continued selling pressure as the Brent Crude oil soared nearly two dollars, approaching \$81 per barrel. Honda Motorcycle and Scooter India (HMSI) said it has crossed 20 lakh cumulative exports mark, 17 years after it started shipping its products overseas. Vakrangee has entered in to a distribution agreement with Aditya Birla Housing Finance, which shall offer distribution of Home Loan and Other related Products through the company's Nextgen Vakrangee Kendras. Mangalam Drugs and Organics has received final approval from WHO for the drug Efavirenz.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(300.8)	(44.4)	(28.7)
MF(INR cr)	695.8	414.1	370.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	45,968	40,592	34,578
F&O(INR cr)	1,047,636	1,232,369	932,540

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	11.7	13.1	14.1
NSE VIX	17.4	14.5	13.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,970	(2.4) %	2.6 %	Energy	15,589	0.1 %	17.3 %
IT	16,175	2.2 %	27.3 %	Pharma	9,995	(2.5) %	15.9 %
Metals	3,632	(1.1) %	2.6 %	Finance	10,485	(3.4) %	2.2 %
Auto	10,001	(3.9) %	(9.6) %	PSU	2,757	(2.7) %	(3.4) %
FMCG	29,749	(2.2) %	12.3 %	Real Estate	236	(5.3) %	(20.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
TCS	2,198	4.5 %	51.1 %	Piramal En	2,518	(8.2) %	1.9 %
Emami	519	2.7 %	(5.0) %	Rural Elec	98	(7.9) %	(23.4) %
Shree Ceme	17,226	2.2 %	5.0 %	Motherson	254	(7.7) %	(21.4) %
Coal India	281	2.1 %	1.3 %	Indiabulls	982	(7.6) %	(21.1) %
Infosys	718	1.8 %	26.3 %	Eicher Mot	25,853	(7.5) %	(8.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
German Wholesale Price Index (MoM) (AUG)	25-09-2018	06:00	EUR	-	0
German Wholesale Price Index (YoY) (AUG)	25-09-2018	06:00	EUR	-	0.035
ECB's Praet Speaks at FT Event in London	25-09-2018	08:10	EUR	-	-
ECB's Praet Speaks at InTouch Capital's Event in London	25-09-2018	10:45	EUR	-	-
ECB's Praet Speaks at OMFIF in London	25-09-2018	10:45	EUR	-	-
ECB's Coeure Chairs Session at 3rd ECB Annual Research Conference	25-09-2018	14:40	EUR	-	-
ECB's Coeure Speaks in Frankfurt	25-09-2018	16:00	EUR	-	-
BOE's Vlieghe speaks in London	25-09-2018	08:40	GBP	-	-
BOJ Outright Bond Purchase 5~10 Years	25-09-2018	01:10	JPY	-	-
Coincident Index (JUL F)	25-09-2018	05:00	JPY	-	116.3
Leading Index CI (JUL F)	25-09-2018	05:00	JPY	-	103.5
Supermarket Sales (YoY) (AUG)	25-09-2018	05:00	JPY	-	0.015
BOJ Kuroda speaks in Osaka	25-09-2018	05:30	JPY	-	-
Economic Activity IGAE (YoY) (JUL)	25-09-2018	13:00	MXN	-	0.0115
ANZ Consumer Confidence (MoM) (SEP)	25-09-2018	22:00	NZD	-	(0.007)
ANZ Consumer Confidence Index (SEP)	25-09-2018	22:00	NZD	-	117.6
Exports (AUG)	25-09-2018	22:45	NZD	-	-
Imports (AUG)	25-09-2018	22:45	NZD	-	-
Trade Balance (AUG)	25-09-2018	22:45	NZD	-	-
Trade Balance 12 Mth YTD (AUG)	25-09-2018	22:45	NZD	-	-
House Price Index (MoM) (JUL)	25-09-2018	13:00	USD	-	0.002
S&P CoreLogic CS 20-City (MoM) SA (JUL)	25-09-2018	13:00	USD	-	0.0011
S&P/Case-Shiller 20-City Index n.s.a (JUL)	25-09-2018	13:00	USD	-	213.07
S&P/Case-Shiller Composite-20 (YoY) (JUL)	25-09-2018	13:00	USD	-	0.0631
S&P/Case-Shiller US Home Price Index (JUL)	25-09-2018	13:00	USD	-	204.48
S&P/Case-Shiller US Home Price Index (YoY) (JUL)	25-09-2018	13:00	USD	-	0.062
Conf. Board Expectations (SEP)	25-09-2018	14:00	USD	-	107.6
Conf. Board Present Situation (SEP)	25-09-2018	14:00	USD	-	172.2
Consumer Confidence Index (SEP)	25-09-2018	14:00	USD	-	122.4



Richmond Fed Manufact. Index (SEP)	25-09-2018	14:00	USD	-	24
U.S. to Sell 2-Year Floating Rate Notes Reopening	25-09-2018	15:30	USD	-	-
U.S. to Sell 4-Week Bills	25-09-2018	15:30	USD	-	-
U.S. to Sell 5-Year Notes	25-09-2018	17:00	USD	-	-

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