



25 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,588	0.0 %	(0.7) %
BSE SENSEX	39,097	0.0 %	0.6 %
CNX BANK	30,183	0.0 %	(0.5) %
CNX MIDCAP	16,634	0.0 %	(9.3) %
CNX SMALLCAP	5,830	0.0 %	(13.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,808	(0.5) %	14.9 %
S&P 500	2,967	(0.8) %	18.3 %
FTSE 100	7,291	(0.5) %	8.3 %
HANG SENG	26,281	0.2 %	4.6 %
NIKKEI	22,099	0.1 %	13.0 %
SHANGHAI COMPOSITE	2,985	0.3 %	21.1 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.70	(0.6) %	1.8 %
EUR/USD	1.10	(0.4) %	(3.9) %
GBP/USD	1.25	(0.2) %	(2.2) %
USD/JPY	107.44	(0.5) %	(2.0) %
USD/AUD	1.47	0.1 %	3.7 %
USD/SGD	1.38	(0.1) %	0.9 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.4 %	25.3 %
Gold(INR/10g)	37,771	0.1 %	19.8 %
Gold Comex(USD/oz)	1,528	0.2 %	18.3 %
SILVER(INR/1Kg)	47,352	1.2 %	23.8 %
Aluminium(USD/MT)	1,756	(0.6) %	(5.5) %
Copper(USD/MT)	5,695	(1.4) %	(2.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

Global Economy: The US Conference Board said its consumer confidence index tumbled to 125.1 in September from a downwardly revised 134.2 in August. US President Donald Trump reiterated complaints about China's trade practices just weeks before negotiators from both sides are due to meet in Washington. Germany's business confidence improved slightly in September on a better assessment of the current situation, while expectations for coming months worsened again, survey results from the IFO Institute showed on Tuesday. The IFO business confidence index rose to 94.6 from 94.3 in August. UK manufacturing orders fell in September, survey results from the Confederation of British Industry showed Tuesday. According to Industrial Trends survey, the order book balance fell to -28% in September from -13% in August. The export order book balance declined to -32% from -15%. France's manufacturing sentiment weakened in September, survey results from the statistical office Insee showed Tuesday. The manufacturing confidence index fell slightly to 102 from revised 103 in August. Japan's leading index edged up in July, final data from the Cabinet Office showed on Tuesday. The leading index, which measures the future economic activity, rose to 93.7 in July from 93.6 in June. Japan's private sector expanded at a slightly slower pace in September as manufacturing activity contracted further, survey results from IHS Markit showed Tuesday. The Jibun Bank flash composite output index fell to 51.2 from 51.9 in August. The services Purchasing Managers' Index dropped to 52.8 from 53.3 in the previous month while the factory PMI fell to 48.9 from 49.3 a month ago.

Global Equities: Stocks saw tepid moves amid broad worries over the US-China trade standoff.

Indian Economy: Reserve Bank of India has placed the Punjab and Maharashtra Cooperative Bank Limited, under directions. According to the directions, depositors will be allowed to withdraw a sum not exceeding Rs 1,000 of the total balance in every savings bank account or current account or any other deposit account by whatever name called, subject to conditions stipulated in the RBI Directions. Lot of improvement is needed in compliance culture across banks and well governed banks contribute to an efficient and cost-effective supervisory process, as there is less need for supervisory intervention, stated MK Jain, Deputy Governor, Reserve Bank of India noted in a speech. Nitin Gadkari, Union Minister for Micro Small and Medium Enterprises (MSME) stated in a public speech yesterday that energy is the driving force for all the economic activities including MSME sector. Government of India has announced the sale of four dated securities for Rs 17,000 crore. Subject to the limit of Rs 17000 Crore being total notified amount, GoI will have the option to retain additional subscription up to Rs 1000 Cr each against any one or more of the above securities.

Equity Markets: Local stocks ended almost flat on Tuesday after surging in previous two sessions. Banks and metal stocks witnessed correction after recent rally. IT stocks bounced after steep losses in the past two sessions. S&P BSE Sensex rose 7.11 points or 0.02% to 39,097.14. The Nifty 50 index fell 12 points or 0.10% to 11,588.20.

Corporate News: Kaveri Seed Company said that the company's board has approved buyback of equity shares of up to 28 lakh shares, representing 4.44% of equity shares aggregating to Rs 196 crore on proportionate basis through tender offer route. The buyback price is set at Rs 700 per share. The promoters intend to participate in the proposed share buyback. JSW Steel said that the Finance Committee of the Board of Directors of the company has approved the issuance of fixed rate senior unsecured notes aggregating to US\$400 million and has approved the pricing, tenure and other terms of the Notes. State Bank of India has launched its digital banking app YONO in the UK, marking its global launch.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	395.4	(26.8)	(0.1)
MF(INR cr)	427.6	694.1	418.8

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	46,733	39,182	35,080
F&O(INR cr)	1,369,103	1,490,463	1,316,100

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.9	15.7	15.5
NSE VIX	16.7	16.0	17.5

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	30,183	(1.3) %	(0.5) %	Energy	15,101	0.7 %	(8.7) %
IT	15,339	2.0 %	(3.2) %	Pharma	7,892	0.4 %	(15.8) %
Metals	2,485	(1.6) %	(19.9) %	Finance	13,398	(1.2) %	7.2 %
Auto	7,773	(0.4) %	(7.6) %	PSU	2,523	(2.3) %	(25.5) %
FMCG	31,312	0.6 %	3.7 %	Real Estate	269	(1.3) %	0.7 %

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>
Bajaj Hold	3,688	4.3 %	10.0 %	JSW Steel	233	(4.2) %	(20.2) %
Infosys	794	3.9 %	5.2 %	Eicher Mot	18,434	(4.2) %	(8.1) %
Havells In	757	3.5 %	(2.4) %	Bandhan Ba	506	(4.0) %	(4.5) %
Reliance I	1,279	3.2 %	(8.1) %	St Bk of I	303	(3.6) %	(6.2) %
Tech Mahin	704	3.1 %	(10.4) %	Larsen & T	1,481	(3.1) %	4.9 %

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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