



25 Oct.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,140	(0.8) %	(0.7) %
BSE SENSEX	34,034	0.6 %	1.6 %
CNX BANK	25,064	0.0 %	3.0 %
CNX MIDCAP	16,379	0.0 %	(14.2) %
CNX SMALLCAP	5,860	0.0 %	(26.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,583	(2.4) %	(1.0) %
S&P 500	2,656	(3.1) %	(1.5) %
FTSE 100	6,963	0.1 %	(9.0) %
HANG SENG	25,250	(0.4) %	(17.3) %
NIKKEI	22,091	0.4 %	(6.0) %
SHANGHAI COMPOSITE	2,603	0.3 %	(22.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	73.16	(0.6) %	14.9 %
EUR/USD	1.14	(0.5) %	(5.0) %
GBP/USD	1.29	(0.6) %	(4.6) %
USD/JPY	112.10	(0.4) %	(0.6) %
USD/AUD	1.41	(0.1) %	10.5 %
USD/SGD	1.38	0.0 %	3.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	66	(4.0) %	10.0 %
Gold(INR/10g)	31,692	(0.7) %	8.0 %
Gold Comex(USD/oz)	1,235	0.7 %	(5.6) %
SILVER(INR/1Kg)	38,523	(0.1) %	(0.2) %
Aluminium(USD/MT)	1,997	(0.3) %	(11.5) %
Copper(USD/MT)	6,168	(1.9) %	(14.1) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.2	(0.0) %	0.7 %

Global Economy: The US Commerce Department data showed that new home sales in the US fell sharply. The new home sales plummeted by 5.5% to an annual rate of 553,000 in September from the revised August rate of 585,000. Eurozone private sector grew at the slowest rate for around two years in October as an export-led slowdown continued to broaden-out to the service sector, survey data from IHS Markit showed Wednesday. The composite output index dropped to 52.7 from 54.1 in September. A reading above 50 still indicates expansion though. The services Purchasing Managers' Index came in at 53.3, down from 54.7 in September while the manufacturing PMI dropped to 52.1 from 53.2 in September.

Global Equities: Sentiments mostly remained stressed as worries about US corporate earnings and broad concerns over Middle East stayed in place.

Indian Economy: According to latest data from the RBI on the Scheduled Banks' Statement of Position, the Demand & Time deposits from banks dropped from Rs 1486.46 crore to Rs 1437.61 crore in fortnight ended 12th October 2018. Borrowings from banks went up from Rs 761.39 to Rs 788.37. Demand deposits fell from Rs 13095.95 crore to Rs 12087.97 crore. The value of commercial banks' investments in Central & State Govt securities jumped from Rs 34463.08 crore to Rs 34940.08 crore. Loans, cash credits & Overdrafts also rose from Rs 87544.90 crore to Rs 87699.14 crore.

Equity Markets: Local stocks rebounded on Wednesday, snapping four straight sessions of decline, with the sentiment supported by falling oil prices and a firmer rupee. The Sensex settled a tad above the psychological 34,000 level after moving above and below that level in intraday trade. The oil marketing companies jumped after crude oil futures edged lower. Lower crude oil prices could reduce under-recoveries of public sector oil marketing companies (PSU OMCs) on domestic sale of LPG and kerosene at controlled prices.

Corporate News: Wipro reported 10% fall (QoQ) in September quarter net profit to Rs 1890 crore while its revenue rose by 2.3% to Rs 14,567.9 crore. The company has appointed Arundhati Bhattacharya as an additional director of the company for a term of five years with effect from January 1, 2019. Kotak Mahindra Bank reported a 21% year-on-year (YoY) rise in consolidated net profit at Rs 1747 crore for the September quarter. It included Rs 1142 crore (up 14.88% YoY) contribution from the banking activity. The bank had reported Rs 1,441 crore profit in the corresponding quarter last year. Bajaj Holdings net sales came in at Rs 697.50 crore in September 2018 down 10.71% from September 2017. Quarterly net profit was Rs 646.06 crore in September 2018, down 11.76% while the EBITDA stood at Rs. 680.64 crore, down 11.41%. Hexaware Technologies net sales came at Rs 473.14 crore in September 2018, up 16.79% from in September 2017. Quarterly net profit was at Rs. 141.12 crore in September 2018, up 22.55% while EBITDA stood at Rs. 184.18 crore, up 22.14%. Bajaj Auto reported a 3.65% rise in September quarter profit. Sales volume grew 25% to a quarterly record of around 1.3 million units, while total revenue from operations rose 21.6% in the quarter.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(13.8)	(174.7)	(48.9)
MF(INR cr)	825.6	979.4	463.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	36,443	38,503	35,342
F&O(INR cr)	1,333,824	1,104,513	972,208

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.7	18.2	14.5
NSE VIX	18.9	19.0	14.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,064	0.4 %	3.0 %	Energy	13,633	0.2 %	2.6 %
IT	14,049	0.2 %	10.6 %	Pharma	9,334	(0.4) %	8.3 %
Metals	3,348	1.1 %	(5.4) %	Finance	10,465	1.4 %	2.0 %
Auto	8,664	0.2 %	(21.7) %	PSU	2,637	0.3 %	(7.6) %
FMCG	28,631	0.5 %	8.0 %	Real Estate	210	3.1 %	(29.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bajaj Fin.	2,312	11.0 %	27.1 %	Cadila Hea	358	(5.3) %	(7.1) %
Bharti Air	316	10.5 %	(20.1) %	Yes Bank	204	(4.3) %	(33.4) %
H P C L	233	6.8 %	(32.4) %	Bajaj Auto	2,475	(4.3) %	(11.9) %
I O C L	138	5.8 %	(19.3) %	Container	558	(3.2) %	(10.1) %
Ashok Leyl	117	4.8 %	(21.1) %	SBI Life I	564	(2.7) %	(17.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CFIB Business Barometer (OCT)	25-10-2018	10:00	CAD	-	61.4
German GfK Consumer Confidence (NOV)	25-10-2018	06:00	EUR	-	10.6
German IFO Business Climate (OCT)	25-10-2018	08:00	EUR	-	103.7
German IFO Current Assessment (OCT)	25-10-2018	08:00	EUR	-	106.4
German IFO Expectations (OCT)	25-10-2018	08:00	EUR	-	101
ECB Deposit Facility Rate (OCT 25)	25-10-2018	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (OCT 25)	25-10-2018	11:45	EUR	-	0.0025
European Central Bank Rate Decision (OCT 25)	25-10-2018	11:45	EUR	-	0
Tokyo Consumer Price Index (YoY) (OCT)	25-10-2018	23:30	JPY	-	0.013
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (OCT)	25-10-2018	23:30	JPY	-	0.01
Tokyo Consumer Price Index Ex-Fresh Food, Energy (YoY) (OCT)	25-10-2018	23:30	JPY	-	0.007
Advance Goods Trade Balance (SEP)	25-10-2018	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (SEP P)	25-10-2018	12:30	USD	-	(0.009)
Cap Goods Ship Nondef Ex Air (SEP P)	25-10-2018	12:30	USD	-	(0.002)
Continuing Claims (OCT 13)	25-10-2018	12:30	USD	-	-
Durable Goods Orders (SEP P)	25-10-2018	12:30	USD	-	0.044
Durables Ex Transportation (SEP P)	25-10-2018	12:30	USD	-	0
Initial Jobless Claims (OCT 2)	25-10-2018	12:30	USD	-	-
Retail Inventories (MoM) (SEP)	25-10-2018	12:30	USD	-	0.007
Wholesale Inventories (MoM) (SEP P)	25-10-2018	12:30	USD	-	0.01
Pending Home Sales (MoM) (SEP)	25-10-2018	14:00	USD	-	(0.018)
Pending Home Sales (YoY) (SEP)	25-10-2018	14:00	USD	-	(0.025)
EIA Natural Gas Storage Change (OCT 19)	25-10-2018	14:30	USD	-	81
EIA Working Natural Gas Implied Flow (OCT 19)	25-10-2018	14:30	USD	-	81
Kansas City Fed Manf. Activity (OCT)	25-10-2018	15:00	USD	-	13
Fed Vice Chairman Clarida Speaks on Economic Outlook	25-10-2018	16:15	USD	-	-
U.S. to Sell USD31 Bln 7-Year Notes	25-10-2018	17:00	USD	-	-

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