



25 Oct.2019

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|----------------|--------|---------|----------|
| CNX NIFTY | 11,583 | 0.0 % | (0.7) % |
| BSE SENSEX | 39,020 | (0.1) % | 0.4 % |
| CNX BANK | 29,108 | 0.0 % | (4.0) % |
| CNX MIDCAP | 16,195 | 0.0 % | (11.7) % |
| CNX SMALLCAP | 5,616 | 0.0 % | (16.7) % |

| GLOBAL INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|--------|
| DOW JONES | 26,806 | (0.1) % | 14.9 % |
| S&P 500 | 3,010 | 0.2 % | 20.1 % |
| FTSE 100 | 7,328 | 0.9 % | 8.8 % |
| HANG SENG | 26,798 | 0.9 % | 6.6 % |
| NIKKEI | 22,751 | 0.6 % | 16.3 % |
| SHANGHAI COMPOSITE | 2,941 | (0.0) % | 19.3 % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.58 | (0.2) % | 1.7 % |
| EUR/USD | 1.11 | (0.3) % | (2.9) % |
| GBP/USD | 1.29 | (0.6) % | 1.0 % |
| USD/JPY | 108.51 | (0.0) % | (1.0) % |
| USD/AUD | 1.46 | 0.3 % | 2.8 % |
| USD/SGD | 1.36 | 0.1 % | (0.1) % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|---------|---------|
| WTI Crude(USD/bbl) | 54 | 1.6 % | 16.4 % |
| Gold(INR/10g) | 38,281 | (0.0) % | 21.4 % |
| Gold Comex(USD/oz) | 1,496 | 0.2 % | 15.9 % |
| SILVER(INR/1Kg) | 45,444 | (0.0) % | 18.8 % |
| Aluminium(USD/MT) | 1,712 | 0.3 % | (7.9) % |
| Copper(USD/MT) | 5,773 | (0.4) % | (1.1) % |

FIXED INCOME

| INTERBANK RATES | LATEST | BPS 1D | BPS YTD |
|-----------------|--------|--------|---------|
| 10 Y GSec US 10 | 1.8 | 0.0 % | (0.9) % |

Global Economy: US durable goods orders tumbled by 1.1% in September after rising by a revised 0.3% in August, a report released by the Commerce Department on Thursday showed. US new home sales fell by 0.7% to an annual rate of 701,000 in September after spiking by 6.2% to a revised rate of 706,000 in August, according to a report released by the Commerce Department on Thursday. European Central Bank (ECB) decided that the interest rate on the main refinancing operations and the interest rates on the marginal lending facility and the deposit facility will remain unchanged at 0.00%, 0.25% and -0.50% respectively. The Governing Council expects the key ECB interest rates to remain at their present or lower levels until it has seen the inflation outlook robustly converge to a level sufficiently close to, but below, 2% within its projection horizon, and such convergence has been consistently reflected in underlying inflation dynamics. Euro area private sector composite output index rose slightly to 50.2 in October from 50.1 in September, survey data from IHS Markit showed Thursday. A score above 50 indicates expansion, and that below 50 suggests contraction. A steep decline in manufacturing output was accompanied by one of the weakest service sector expansions since 2014. The manufacturing Purchasing Managers' Index remained unchanged at 45.7 in October. The services PMI rose to 51.8 from 51.6 a month ago. Japan's private sector contracted in October as typhoon disrupted service sector activity, survey results from IHS Markit showed. The Jibun Bank flash composite output index fell to 49.8 from 51.5 in September. Japan's leading index fell in August but remained at the lowest level in nearly ten years in August, final data from the Cabinet Office showed. The leading index, which measures the future economic activity, fell to 91.9 in August from 93.7 in July. The Commonwealth Bank of Australia Flash Composite Output Index dropped to 50.7 in October from 52.0 in September.

Global Equities: European stocks edged up amid steady trades.

Indian Economy: Fitch Ratings trimmed India's GDP growth forecast in the current fiscal to 5.5% saying a large credit squeeze emanating from shadow banks has pushed economic growth to a six year low, media reports noted today. Governments of 115 economies around the world launched 294 reforms over the past year to make doing business easier for their domestic private sector, paving the way for more jobs, expanded commercial activity, and higher incomes for many, according to the World Bank Group's Doing Business 2020 study. The ten economies where business climates improved the most were Saudi Arabia, Jordan, Togo, Bahrain, Tajikistan, Pakistan, Kuwait, China, India, and Nigeria, the study found.

Equity Markets: Key equity indices ended with small losses on Thursday. Trading was volatile on account of weekly index options expiry. Traders keenly watched the Assembly election results in Maharashtra and Haryana. Risk appetite was affected as BJP was seen struggling to reach majority mark of 46 seats in Haryana. BSE Sensex fell 38.44 points or 0.10% to 39,020.39. The Nifty 50 index declined 21.50 points or 0.19% to 11,582.60.

Corporate News: ITC reported 37.12% rise in consolidated net profit to Rs 4119.16 crore on 6.62% rise in total income to Rs 13497.27 crore in Q2 September 2019 over Q2 September 2018. Colgate-Palmolive (India) reported 24.31% rise in net profit to Rs 244.11 crore on 4.57% rise in total income to Rs 1230.43 crore in Q2 September 2019 over Q2 September 2018. Interglobe Aviation reported consolidated net loss of Rs 1061.99 crore in Q2 September 2019 as compared to net loss of Rs 651.54 crore in Q2 September 2018. Total income rose 31.1% to Rs 8539.78 crore in Q2 September 2019 over Q2 September 2018. Raymond reported 33.5% rise in consolidated net profit to Rs 83.96 crore on 2.18% rise in total income to Rs 1916.59 crore in Q2 September 2019 over Q2 September 2018.



FUND FLOWS

| | <i>LATEST</i> | <i>MTD</i> | <i>YTD</i> |
|-------------|---------------|------------|------------|
| FII(USD mm) | (21.0) | 39.8 | 14.0 |
| MF(INR cr) | 103.5 | 360.0 | 407.0 |

MARKET TURNOVER

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|--------------|---------------|----------------|----------------|
| Cash(INR cr) | 44,342 | 38,435 | 35,704 |
| F&O(INR cr) | 2,881,937 | 1,542,121 | 1,350,321 |

MARKET VOLATILITY

| | <i>LATEST</i> | <i>AVG MTD</i> | <i>AVG YTD</i> |
|----------|---------------|----------------|----------------|
| CBOE VIX | 17.0 | 17.5 | 15.8 |
| NSE VIX | 16.2 | 16.9 | 17.4 |

NSE INDICES / SECTORAL PERFORMANCE

| | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> | | <i>LATEST</i> | <i>% 1D</i> | <i>% YTD</i> |
|--------|---------------|-------------|--------------|-------------|---------------|-------------|--------------|
| Banks | 29,108 | (1.2) % | (4.0) % | Energy | 16,116 | (0.0) % | (2.5) % |
| IT | 14,782 | (0.3) % | (6.7) % | Pharma | 7,728 | (0.4) % | (17.6) % |
| Metals | 2,420 | (0.7) % | (22.0) % | Finance | 13,334 | (0.5) % | 6.7 % |
| Auto | 8,012 | (0.3) % | (4.8) % | PSU | 2,225 | (3.6) % | (34.3) % |
| FMCG | 31,753 | (0.5) % | 5.2 % | Real Estate | 264 | 0.9 % | (1.2) % |

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> |
|--------------------|---------------|-------------|--------------|-------------------|---------------|-------------|--------------|
| Motherson | 112 | 3.6 % | (27.4) % | Vodafone I | 4 | (23.0) % | (75.5) % |
| Bharti Air | 372 | 3.3 % | 19.0 % | Bharti Inf | 238 | (8.4) % | (24.4) % |
| Reliance I | 1,436 | 3.2 % | 3.2 % | Yes Bank | 48 | (5.7) % | (82.5) % |
| Pidilite I | 1,363 | 2.8 % | 8.8 % | Biocon | 245 | (5.1) % | (20.9) % |
| Shree Ceme | 20,305 | 2.7 % | 8.0 % | Grasim Ind | 706 | (5.1) % | (17.7) % |

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 | | | | | |

..... End of Report