



26 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,749	(0.1) %	5.3 %
BSE SENSEX	35,470	(0.6) %	6.6 %
CNX BANK	26,508	(0.4) %	9.0 %
CNX MIDCAP	18,433	(0.3) %	(3.5) %
CNX SMALLCAP	7,368	(0.3) %	(7.1) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,253	(1.3) %	(2.3) %
S&P 500	2,717	(1.4) %	0.8 %
FTSE 100	7,510	(2.2) %	(1.8) %
HANG SENG	28,961	(1.3) %	(5.1) %
NIKKEI	22,338	(0.8) %	(5.0) %
SHANGHAI COMPOSITE	2,859	(1.1) %	(14.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.13	0.2 %	7.0 %
EUR/USD	1.17	0.9 %	(2.5) %
GBP/USD	1.33	0.2 %	(1.7) %
USD/JPY	109.39	(0.6) %	(3.0) %
USD/AUD	1.35	(0.3) %	5.6 %
USD/SGD	1.36	0.2 %	2.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	0.0 %	12.8 %
Gold(INR/10g)	30,540	0.2 %	4.0 %
Gold Comex(USD/oz)	1,266	0.0 %	(3.3) %
SILVER(INR/1Kg)	39,425	(0.5) %	2.1 %
Aluminium(USD/MT)	2,172	0.0 %	(3.7) %
Copper(USD/MT)	6,783	0.0 %	(5.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Germany's business confidence index fell to 101.8 in June, reports said citing survey data from Ifo Institute on Monday. The initially estimated score for May was 102.2. The current conditions index came in at 105.1. The reading was forecast to drop to 105.7 in June from May's initial value of 106.0. At the same time, the expectations index score was 98.6 in June compared to the expected 98.0. A study from the London-based Center for European Reform has found that the UK's decision to exit the European Union has already slowed the nation's economic growth by a cumulative 2.1% as of the first quarter of 2018, compared to likely results had Brexit been rejected two years ago. The study also found that the referendum vote is now costing the British government £440 million (around \$584 million) per week in lost tax revenue, challenging longtime claims by Brexit supporters that leaving the EU would improve government balance sheets. Japan leading index, which measures the future economic activity, rose to 106.2 in April from 104.5 in March, latest figures from the Cabinet Office showed.

Global Equities: Stocks slipped in US and Europe, witnessing substantial losses for the major indices. Commodity prices turned lower following a mixed action in Asia as worries over global trade flows hurt the sentiments.

Indian Economy: Indian companies' investments into their overseas subsidiaries/joint ventures slipped by 63% to \$1.17 billion in May this year, according to RBI data. In May 2017, India Inc's foreign direct investment stood at \$3.12 billion. In April 2018, the outward foreign direct investment (OFDI) of Indian firms was \$3.56 billion.

Equity Markets: Local stocks eased yesterday. Trading for the week began on a subdued note as the key benchmark indices logged modest losses weighed by negative global stocks. Public sector banks declined. Oil stocks fell. Domestic stocks edged lower in early trade on negative Asian stocks. Stocks turned volatile in morning trade as the key benchmark indices once again dipped in negative zone after briefly turning positive. Volatility continued as the key benchmark indices traded in negative zone till afternoon trade. Stocks resumed decline in mid-afternoon trade.

Corporate News: India's largest two-wheeler maker Hero MotoCorp is expecting a double-digit growth for its global business on the back of new launches and more focus on markets with potential of higher volumes, according to Chairman and Managing Director Pawan Munjal, noted media reports. Oil India (OIL) has made its second hydrocarbon discovery in the onland KG Basin NELP VI Block: KG-ONN-2004/1 in May 2018 at well Thanelanka-1 in Andhra Pradesh. Earlier, a gas discovery was made at well Dangeru -lin Andhra Pradesh in the block. The well Thanelanka-1 is the first High Pressure - High Temperature (HP-HT) well drilled by OIL and has encountered multiple sands in Gollapalli Formation of Late Jurassic-Early Cretaceous and one zone in Raghavapuram Formation of Intra Cretaceous. Jet Airways (India) has entered into another agreement with The Boeing Company for purchase of an additional 75 Boeing 737 MAX Aircraft.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	183.1	(32.9)	(49.8)
MF(INR cr)	616.3	386.5	492.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,669	29,040	33,020
F&O(INR cr)	756,917	824,875	816,419

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.8	12.7	15.1
NSE VIX	12.6	12.7	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,610	(0.6) %	9.4 %	Energy	13,777	(1.2) %	3.7 %
IT	13,865	0.6 %	9.1 %	Pharma	9,287	(0.8) %	7.7 %
Metals	3,397	(1.0) %	(4.0) %	Finance	11,140	(0.7) %	8.6 %
Auto	10,910	(1.6) %	(1.3) %	PSU	2,887	(2.1) %	1.1 %
FMCG	28,496	(0.5) %	7.5 %	Real Estate	278	(1.5) %	(6.2) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
UltraTech	3,752	3.0 %	(5.7) %	Idea Cellu	56	(7.5) %	(28.0) %
Bajaj Fin.	2,391	2.3 %	31.5 %	Tata Motor	169	(7.2) %	(10.9) %
Bharti Inf	292	2.1 %	(13.5) %	Tata Motor	289	(6.0) %	(14.7) %
Infosys	1,272	2.0 %	11.9 %	Motherson	288	(5.3) %	(11.0) %
ACC	1,316	1.6 %	(14.4) %	Emami	504	(3.9) %	(7.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ECB's Coeure Speaks in Singapore	26-06-2018	01:20	EUR	-	-
ECB Vice President De Guindos Speaks in Frankfurt	26-06-2018	12:00	EUR	-	-
BBA Loans for House Purchase (MAY)	26-06-2018	08:30	GBP	-	38049
Haskel, Fried Speak at BOE Appointment Hearings in London	26-06-2018	09:00	GBP	-	-
BOE's McCafferty Speaks in London	26-06-2018	09:30	GBP	-	-
CBI Reported Sales (JUN)	26-06-2018	10:00	GBP	-	11
CBI Total Dist. Reported Sales (JUN)	26-06-2018	10:00	GBP	-	17
BOJ 1Q Money Flow	26-06-2018	23:50	JPY	-	-
Exports (MAY)	26-06-2018	22:45	NZD	-	-
Imports (MAY)	26-06-2018	22:45	NZD	-	-
Trade Balance (MAY)	26-06-2018	22:45	NZD	-	-
Trade Balance 12 Mth YTD (MAY)	26-06-2018	22:45	NZD	-	-
S&P CoreLogic CS 20-City (MoM) SA (APR)	26-06-2018	13:00	USD	-	0.0053
S&P/Case-Shiller 20-City Index n.s.a (APR)	26-06-2018	13:00	USD	-	208.62
S&P/Case-Shiller Composite-20 (YoY) (APR)	26-06-2018	13:00	USD	-	0.0679
S&P/Case-Shiller US Home Price Index (APR)	26-06-2018	13:00	USD	-	198.94
S&P/Case-Shiller US Home Price Index (YoY) (APR)	26-06-2018	13:00	USD	-	0.0653
Conf. Board Expectations (JUN)	26-06-2018	14:00	USD	-	105.6
Conf. Board Present Situation (JUN)	26-06-2018	14:00	USD	-	161.7
Consumer Confidence Index (JUN)	26-06-2018	14:00	USD	-	128
Richmond Fed Manufact. Index (JUN)	26-06-2018	14:00	USD	-	16
U.S. to Sell 4-Week Bills	26-06-2018	15:30	USD	-	-
U.S. to Sell USD34 Bln 2-Year Notes	26-06-2018	17:00	USD	-	-
Fed's Bostic Speaks in Birmingham, Alabama	26-06-2018	17:15	USD	-	-
Fed's Kaplan Speaks in Houston	26-06-2018	17:45	USD	-	-

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