



26 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,796	0.0 %	1.1 %
BSE SENSEX	39,435	0.8 %	1.6 %
CNX BANK	30,847	0.0 %	1.7 %
CNX MIDCAP	17,473	0.0 %	(4.7) %
CNX SMALLCAP	6,161	0.0 %	(8.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,548	(0.7) %	13.8 %
S&P 500	2,917	(1.0) %	16.4 %
FTSE 100	7,422	0.1 %	10.2 %
HANG SENG	28,186	(1.2) %	12.2 %
NIKKEI	21,194	(0.4) %	8.3 %
SHANGHAI COMPOSITE	2,982	(0.9) %	21.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.38	(0.1) %	(0.1) %
EUR/USD	1.14	0.9 %	(0.5) %
GBP/USD	1.27	0.3 %	(0.1) %
USD/JPY	107.37	(0.2) %	(2.1) %
USD/AUD	1.44	(0.6) %	1.2 %
USD/SGD	1.35	(0.3) %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	(10.8) %	24.3 %
Gold(INR/10g)	34,329	0.8 %	8.9 %
Gold Comex(USD/oz)	1,423	(0.1) %	10.2 %
SILVER(INR/1Kg)	38,028	0.3 %	(0.6) %
Aluminium(USD/MT)	1,777	1.7 %	(4.4) %
Copper(USD/MT)	5,986	1.2 %	2.5 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.0	0.0 %	(0.6) %

Global Economy: Speaking at an event in New York, US Fed Chief Jerome Powell reiterated his outlook for slow but positive US growth this year. He noted that the central bank will act as appropriate to sustain the US economic expansion. US Conference Board said its consumer confidence index tumbled to 121.5 in June from a downwardly revised 131.3 in May, reflecting the escalation in trade and tariff tensions earlier this month. The consumer confidence index slumped to its lowest level since hitting 120.6 in September of 2017. The US Commerce Department said new home sales plummeted by 7.8% to an annual rate of 626,000 in May after tumbling by 3.7% to a revised rate of 679,000 in April. Germany's construction orders declined in April from the previous month, data from Destatis showed. The price-adjusted orders in construction industry decreased by a seasonally and working-day adjusted 1.7% month-on-month in April. This decline was due to the high order intake last month on the back of particularly good development. Compared to the previous year, price-adjusted order intake in the main construction industry increased 6.4% in April. From the January to April period, construction orders advanced 7.5% from the same period last year. UK retail sales volume declined the most since the financial crisis a decade ago with poor weather signaling weak economic growth in the second quarter, the latest survey from the Confederation of British Industry showed Tuesday. A balance of 42 percent reported a decline in retail sales volume in June from last year. Japan producer prices were up 0.8% on year in May, the Bank of Japan said on Tuesday, down from the upwardly revised 1.0% gain in April (originally 0.9%). On a monthly basis, producer prices dipped 0.3% after easing 0.1% in the previous month.

Global Equities: Sentiments stayed weary after the United States slapped sanctions on Tehran and the Iranian government said the measures meant permanent closure for diplomacy between the two nations.

Indian Economy: The Union Minister of Finance & Corporate Affairs, Nirmala Sitharaman informed in the Lok Sabha that as per RBI data on global operations (provisional data for the financial year ending March 2019), gross NPAs of PSBs have declined from the peak of Rs 895601 crore in March 2018 to Rs 806412 crore in March 2019 (provisional data). Kerala has emerged as the top ranking state in terms of overall health performance, while Uttar Pradesh is the worst, according to the second health index launched by Niti Aayog. The second round of the health index took into account the period 2015-16 (base year) to 2017-18 (reference year).

Equity Markets: Local markets jumped on buying in leading index counters. Metals and energy stocks dominated the proceedings. Strong buying was observed at lower levels as traders hoped for a supportive budget. Traders also eyed monsoon rainfall as the IMD noted that monsoon rains have covered half of the country. The key barometer, the S&P BSE Sensex, rose 311.98 points or 0.80% to 39,434.94. The Nifty 50 index rose 96.80 points or 0.83% to 11,796.45.

Corporate News: Metal and mining counters can extend gains on firm movement in global Copper prices. Nestle India will be launching MAGGI Fusian -a range of Asian flavor inspired noodles. MAGGI Fusian will be launched in a range of three unique flavors-Bangkok Sweet Chili, Hong Kong Spicy Garlic and Singaporean Tangy Pepper. Dr. Reddy's Laboratories announced the launch of Tobramycin Inhalation Solution, USP a therapeutic equivalent generic version of TOBI (tobramycin) Inhalation Solution, approved by the U.S. Food and Drug Administration.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	8.2	(10.2)	74.9
MF(INR cr)	1,248.2	318.2	95.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,671	31,728	34,331
F&O(INR cr)	1,158,000	1,325,747	1,216,030

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	15.9	15.2
NSE VIX	15.0	14.7	20.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	30,847	0.8 %	1.7 %	Energy	16,093	2.0 %	(2.7) %
IT	16,214	0.2 %	2.4 %	Pharma	7,947	0.6 %	(15.2) %
Metals	2,943	1.7 %	(5.1) %	Finance	13,420	0.8 %	7.4 %
Auto	7,878	0.6 %	(6.4) %	PSU	3,127	1.1 %	(7.6) %
FMCG	29,553	0.3 %	(2.1) %	Real Estate	274	0.9 %	2.6 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
JSW Steel	267	3.6 %	(8.6) %	ICICI Lomb	1,102	(6.3) %	8.5 %
B P C L	393	3.2 %	0.3 %	SBI Life I	674	(5.1) %	12.7 %
Interglobe	1,603	3.1 %	13.2 %	Piramal En	1,901	(2.2) %	(29.4) %
Oracle Fin	3,209	3.1 %	(5.3) %	Yes Bank	110	(1.7) %	(60.1) %
Lupin	754	3.0 %	(1.5) %	United Bre	1,340	(1.5) %	(5.2) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Credit Suisse Survey Expectations (JUN)	26-06-2019	08:00	CHF	-	(14.3)
German GfK Consumer Confidence (JUL)	26-06-2019	06:00	EUR	-	10.1
BBA Loans for House Purchase (MAY)	26-06-2019	08:30	GBP	-	42989
BOE's Carney, Cunliffe, Tenreyro and Saunders Speak	26-06-2019	09:15	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	26-06-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	26-06-2019	01:10	JPY	-	-
Foreign Buying Japan Bonds (JUN 21)	26-06-2019	23:50	JPY	-	-
Foreign Buying Japan Stocks (JUN 21)	26-06-2019	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (JUN 21)	26-06-2019	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (JUN 21)	26-06-2019	23:50	JPY	-	-
Large Retailers' Sales (MAY)	26-06-2019	23:50	JPY	-	(0.018)
Retail Trade (YoY) (MAY)	26-06-2019	23:50	JPY	-	0.005
Retail Trade s.a. (MoM) (MAY)	26-06-2019	23:50	JPY	-	0
The BOJ releases 1Q Money Flow	26-06-2019	23:50	JPY	-	-
RBNZ Official Cash Rate (JUN 26)	26-06-2019	02:00	NZD	-	0.015
MBA Mortgage Applications (JUN 21)	26-06-2019	11:00	USD	-	(0.034)
Advance Goods Trade Balance (MAY)	26-06-2019	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (MAY P)	26-06-2019	12:30	USD	-	(0.01)
Cap Goods Ship Nondef Ex Air (MAY P)	26-06-2019	12:30	USD	-	0
Durable Goods Orders (MAY P)	26-06-2019	12:30	USD	-	(0.021)
Durables Ex Transportation (MAY P)	26-06-2019	12:30	USD	-	0
Retail Inventories (MoM) (MAY)	26-06-2019	12:30	USD	-	0.005
Wholesale Inventories (MoM) (MAY P)	26-06-2019	12:30	USD	-	0.008
DOE Cushing OK Crude Inventory (JUN 21)	26-06-2019	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUN 21)	26-06-2019	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUN 21)	26-06-2019	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUN 21)	26-06-2019	14:30	USD	-	-
Fed's Daly Speaks to the Forecasters Club of New York	26-06-2019	15:30	USD	-	-
U.S. to Call USD18 Billion Floating Rate Note Program	26-06-2019	15:30	USD	-	-



U.S. to Sell USD41 Bln 5-Year Notes

26-06-2019 17:00

USD

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