



26 Jul.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,133	0.0 %	9.0 %
BSE SENSEX	36,858	0.1 %	11.0 %
CNX BANK	27,055	0.1 %	11.2 %
CNX MIDCAP	18,536	0.2 %	(2.9) %
CNX SMALLCAP	7,292	0.2 %	(8.0) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,414	0.7 %	2.4 %
S&P 500	2,846	0.9 %	5.6 %
FTSE 100	7,658	(0.7) %	0.1 %
HANG SENG	28,921	0.9 %	(5.2) %
NIKKEI	22,614	0.5 %	(3.8) %
SHANGHAI COMPOSITE	2,904	(0.1) %	(13.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	68.79	(0.1) %	8.0 %
EUR/USD	1.17	0.4 %	(2.3) %
GBP/USD	1.32	0.7 %	(2.3) %
USD/JPY	110.84	(0.4) %	(1.7) %
USD/AUD	1.34	(0.9) %	5.1 %
USD/SGD	1.36	(0.5) %	1.8 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	0.9 %	13.5 %
Gold(INR/10g)	29,904	0.0 %	1.9 %
Gold Comex(USD/oz)	1,233	0.2 %	(5.8) %
SILVER(INR/1Kg)	38,231	0.6 %	(1.0) %
Aluminium(USD/MT)	2,082	(2.3) %	(7.7) %
Copper(USD/MT)	6,167	0.2 %	(14.1) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.5 %

**Global Economy:** German business confidence index fell to 101.7 in July from 101.8 in June, survey results from Ifo Institute showed Wednesday. The current conditions index came in at 105.3, above last month's 105.2 and the expected level of 104.9. Meanwhile, the expectations index dropped to 98.2 from 98.5. UK mortgage approvals for house purchases rose to 40,541 in June from 39,528 in May, data from UK Finance showed. This was the highest since September 2017. Gross mortgage lending grew 2.1% on year to GBP 23.5 billion in June. Credit card spending was 4.7% higher than a year earlier.

**Global Equities:** European markets turned lower in cautious trade as investors awaited a key meeting between the European Commission and US.

**Indian Economy:** India's goods export is likely to test \$350 billion in the current fiscal despite increasing global protectionism, Commerce & Industry Minister Suresh Prabhu has said. This would likely help exports register 16% growth over last fiscal exports worth \$302 billion. The Minister said that the services sector was set to become a dominant driver of the Indian economy and would contribute around \$3 trillion of the envisaged \$5 trillion GDP by 2025.

**Equity Markets:** A divergent trend was seen as the Sensex ended with small gains while the Nifty 50 index ended with minor losses. A bout of volatility was seen in early trade as stocks regained positive zone soon after erasing intraday gains. A divergent trend was witnessed in morning trade as the barometer index, the S&P BSE Sensex, was trading with small gains while the Nifty 50 index was trading with minor losses. Divergent trend continued in mid-morning trade. Indices pared gains after hitting fresh intraday high in afternoon trade with the Sensex scaling record high.

**Corporate News:** Larsen & Toubro reported 36% year-on-year rise in consolidated profit at Rs 1,215 crore for June quarter. The engineering and construction major had reported Rs 893 crore profit in the year-ago quarter. Consolidated gross revenue for the quarter rose 18% to Rs 28,283 crore. Bharti Infratel, the mobile tower arm of telecom major Bharti Airtel, has received clearance from stock exchanges for its merger with Indus Towers. It will now approach the National Company Law Tribunal for its approval. The government's plan to infuse Rs 11,336 crore in five state-owned banks, including scam-hit PNB, is credit positive and will help these lenders meet the regulatory requirement, according to global rating agency, Moody's. The government will infuse Rs 2,816 crore in Punjab National Bank (PNB), Rs 1,790 crore in Allahabad Bank, Rs 2,019 crore in Andhra Bank, Rs 2,157 crore in Indian Overseas Bank and Rs 2,555 crore in Corporation Bank.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	7.8	(17.5)	(38.1)
MF(INR cr)	(198.5)	367.5	474.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	35,908	31,406	32,681
F&O(INR cr)	874,238	923,900	855,299

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.4	13.4	14.9
NSE VIX	12.2	12.8	13.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,031	0.2 %	11.1 %	Energy	14,457	(0.2) %	8.8 %
IT	14,575	(0.6) %	14.7 %	Pharma	8,969	(0.9) %	4.0 %
Metals	3,262	0.9 %	(7.8) %	Finance	11,398	0.6 %	11.1 %
Auto	10,810	(0.5) %	(2.2) %	PSU	2,936	1.4 %	2.9 %
FMCG	29,965	(0.2) %	13.1 %	Real Estate	264	(1.4) %	(10.8) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NMDC	102	4.7 %	(13.4) %	Bharat Ele	101	(5.5) %	(30.2) %
ICICI Pru	404	4.6 %	4.9 %	NTPC	151	(4.1) %	(11.4) %
Indiabulls	1,307	3.9 %	5.1 %	DLF	184	(3.0) %	(8.7) %
Pidilite I	1,118	3.8 %	18.7 %	Lupin	797	(2.9) %	2.6 %
Hind.Zinc	282	3.4 %	(7.0) %	Sun TV Net	765	(2.8) %	(11.0) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Export Price Index (QoQ) (2Q)	26-07-2018	1:30	AUD	-	0.049
Import Price index (QoQ) (2Q)	26-07-2018	1:30	AUD	-	0.021
Swift Global Payments CNY (JUN)	26-07-2018	1:00	CNY	-	0.019
ECB Deposit Facility Rate (JUL 26)	26-07-2018	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (JUL 26)	26-07-2018	11:45	EUR	-	0.0025
European Central Bank Rate Decision (JUL 26)	26-07-2018	11:45	EUR	-	0
ECB President Draghi Holds Press Conference in Frankfurt	26-07-2018	12:30	EUR	-	-
German GfK Consumer Confidence (AUG)	26-07-2018	6:00	EUR	-	10.7
Corporate Service Price (YoY) (JUN)	26-07-2018	0:50	JPY	-	0.01
Tokyo Consumer Price Index (YoY) (JUL)	26-07-2018	23:30	JPY	-	0.006
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JUL)	26-07-2018	23:30	JPY	-	0.007
Tokyo CPI Ex-Fresh Food, Energy (YoY) (JUL)	26-07-2018	23:30	JPY	-	0.004
ANZ Consumer Confidence (MoM) (JUL)	26-07-2018	22:00	NZD	-	(0.008)
ANZ Consumer Confidence Index (JUL)	26-07-2018	22:00	NZD	-	120
Advance Goods Trade Balance (JUN)	26-07-2018	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (JUN P)	26-07-2018	12:30	USD	-	0.003
Cap Goods Ship Nondef Ex Air (JUN P)	26-07-2018	12:30	USD	-	0.002
Continuing Claims (JUL 14)	26-07-2018	12:30	USD	-	-
Durable Goods Orders (JUN P)	26-07-2018	12:30	USD	-	(0.004)
Durables Ex Transportation (JUN P)	26-07-2018	12:30	USD	-	0
Initial Jobless Claims (JUL 21)	26-07-2018	12:30	USD	-	-
Retail Inventories (MoM) (JUN)	26-07-2018	12:30	USD	-	0.004
Wholesale Inventories (MoM) (JUN P)	26-07-2018	12:30	USD	-	0.006
EIA Natural Gas Storage Change (JUL 20)	26-07-2018	14:30	USD	-	46
EIA Working Natural Gas Implied Flow (JUL 20)	26-07-2018	14:30	USD	-	46
Kansas City Fed Manf. Activity (JUL)	26-07-2018	15:00	USD	-	28
U.S. to Sell USD30 Bln 7-Year Notes	26-07-2018	17:00	USD	-	-

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