



26 Aug.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,829	0.8 %	(7.2) %
BSE SENSEX	36,701	0.6 %	(5.6) %
CNX BANK	26,959	(0.3) %	(11.1) %
CNX MIDCAP	15,354	1.2 %	(16.2) %
CNX SMALLCAP	5,243	0.7 %	(22.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,629	(2.4) %	9.9 %
S&P 500	2,847	(2.6) %	13.6 %
FTSE 100	7,095	(0.5) %	5.4 %
HANG SENG	26,179	0.5 %	4.2 %
NIKKEI	20,711	0.4 %	5.9 %
SHANGHAI COMPOSITE	2,897	0.5 %	17.5 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.73	0.5 %	3.3 %
EUR/USD	1.11	(0.1) %	(3.2) %
GBP/USD	1.22	0.4 %	(4.4) %
USD/JPY	106.46	(0.1) %	(2.9) %
USD/AUD	1.48	0.3 %	4.0 %
USD/SGD	1.39	0.1 %	1.5 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	(2.5) %	16.0 %
Gold(INR/10g)	37,599	(0.2) %	19.2 %
Gold Comex(USD/oz)	1,527	2.2 %	18.3 %
SILVER(INR/1Kg)	43,708	0.2 %	14.2 %
Aluminium(USD/MT)	1,746	0.4 %	(6.0) %
Copper(USD/MT)	5,675	0.1 %	(2.8) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.1) %	(1.1) %

**Global Economy:** The US Federal Reserve Chairman Jerome Powell delivered his much anticipated speech at the Jackson Hole Economic Policy Symposium on Friday and provided a mixed outlook towards the US interest rates. Powell said the Fed is carefully watching developments as we assess their implications for the US outlook and the path of monetary policy. He reiterated that the Fed will act as appropriate to sustain the US economic expansion. The US new home sales plummeted by 12.8% to an annual rate of 635,000 in July after soaring by 20.9% to 728,000 in June.

**Global Equities:** US stocks plunged on Friday after the President Donald Trump stated that American companies have to immediately start looking for an alternative to China. Trump tweeted that the US does not need China. The Dow tumbled 2.4%, Nasdaq crashed 3% and the S&P 500 fell 1.4%. The tweets from Trump came as a reaction to Chinese Finance Ministry plans to impose new tariffs on \$75 billion worth of US imports.

**Indian Economy:** As expected, the government announced a number of measures to push economic expansion, including a key rollback of enhanced super-rich tax on foreign and domestic equity investors, exemption of start-ups from 'angel tax', a package to address distress in the automobile sector and upfront infusion of Rs 70,000 crore to public sector banks. Moody's Investors Service said that India's GDP growth forecast for 2019 calendar year was revised downwards from its previous estimation of 6.8% to 6.2%. The economy remains sluggish due to a combination of factors such as weak hiring, distress among rural households and tighter financial conditions, it noted.

**Equity Markets:** The market ended with decent gains on Friday, reversing early losses. Nifty opened below 10,700 for the first time since 20 February 2019. It quickly regained that level and advanced further. After facing some stiff resistance, the Nifty breached 10,800 level to hit a fresh intraday high in mid-afternoon trade. Despite some profit selling in the final hour, the index managed to close above 10,800 mark. The 30-share BSE Sensex rose 228.23 points or 0.63% to 36,701.16. The Nifty 50 index rose 88 points or 0.82% to 10,829.35.

**Corporate News:** PSU banking stocks would be in focus. Finance minister Nirmala Sitharaman announced upfront capital infusion of Rs 70,000 crore in state-run banks. State-run hydro power giant NHPC is likely to begin construction of the 2,000 MW Lower Subansiri power plant in October this year as it has received the requisite approval from the Assam government, noted media reports. NCL Industries signed an agreement to establish a joint venture company with Qingdao Xinguangzheng Steel Structure Company China. Bandhan Bank has launched credit cards in partnership with Standard Chartered Bank.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(179.9)	(108.2)	10.8
MF(INR cr)	243.2	902.6	350.1

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	35,792	35,593	34,298
F&O(INR cr)	1,043,154	1,500,614	1,275,248

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.9	18.7	15.3
NSE VIX	17.4	16.5	17.7

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	26,959	(0.3) %	(11.1) %	Energy	14,286	2.8 %	(13.6) %
IT	15,817	1.2 %	(0.2) %	Pharma	7,781	1.4 %	(17.0) %
Metals	2,279	3.4 %	(26.5) %	Finance	12,080	0.3 %	(3.4) %
Auto	6,988	1.5 %	(16.9) %	PSU	2,403	2.0 %	(29.0) %
FMCG	28,257	(0.5) %	(6.4) %	Real Estate	245	0.8 %	(8.5) %

### 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>
Vodafone I	6	8.5 %	(67.6) %	L&T Fin.Ho	90	(3.5) %	(40.9) %
Zee Entert	351	6.7 %	(18.7) %	Marico	380	(2.9) %	9.2 %
Vedanta	137	6.5 %	(27.3) %	HDFC Life	517	(2.1) %	34.7 %
UPL	547	5.6 %	(12.1) %	IndusInd B	1,311	(1.9) %	(24.8) %
DLF	152	5.3 %	(22.2) %	ITC	236	(1.6) %	(20.6) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

..... End of Report .....