



26 Sep.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,440	0.0 %	(2.0) %
BSE SENSEX	38,594	(1.3) %	(0.7) %
CNX BANK	29,586	0.0 %	(2.4) %
CNX MIDCAP	16,319	0.0 %	(11.0) %
CNX SMALLCAP	5,716	0.0 %	(15.2) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,971	0.6 %	15.6 %
S&P 500	2,985	0.6 %	19.1 %
FTSE 100	7,290	(0.0) %	8.3 %
HANG SENG	25,945	(1.3) %	3.2 %
NIKKEI	22,020	(0.4) %	12.6 %
SHANGHAI COMPOSITE	2,955	(1.0) %	19.9 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.84	0.2 %	2.0 %
EUR/USD	1.10	(0.2) %	(4.1) %
GBP/USD	1.24	(0.3) %	(2.7) %
USD/JPY	107.51	(0.1) %	(1.9) %
USD/AUD	1.48	0.1 %	4.0 %
USD/SGD	1.38	0.0 %	1.0 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	(2.7) %	21.9 %
Gold(INR/10g)	38,006	0.6 %	20.5 %
Gold Comex(USD/oz)	1,538	0.7 %	19.2 %
SILVER(INR/1Kg)	47,375	0.0 %	23.8 %
Aluminium(USD/MT)	1,752	(0.3) %	(5.7) %
Copper(USD/MT)	5,760	1.1 %	(1.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

Global Economy: The US Commerce Department said new home sales surged 7.1% to an annual rate of 713,000 in August after plunging by 8.6% to a revised rate of 666,000 in July. UK retailers expect sales to ease at a slower pace in October, according to Distributive Trades survey from the Confederation of British Industry, released Wednesday. About 16% of retailers reported a decline in sales volume in September but much smaller than the net 49% reported in August. This marked fifth consecutive decrease. France's consumer confidence strengthened to the highest level in 20 months in September, survey data from the statistical office Insee showed Wednesday. The consumer sentiment index rose to 104 in September from revised 103 in August. Producer prices in Japan were unchanged in August, the Bank of Japan said on Wednesday. On a yearly basis, producer prices were up 0.6%. Asian Development Bank (ADB) stated today that growth in developing Asia remains robust but is now expected to moderate more than forecast in Asian Development Outlook 2019. The latest update from the bank projects that the region will grow by 5.4% this year, or 0.3 percentage points below its April forecast, and that growth will edge up to 5.5% next year, or 0.1 points lower than earlier forecast. Excluding high-income newly industrialized economies, the region is expected to grow by 6.0% this year and next. ADB noted that with the weakening trend in trade, developing Asia suffered slower growth in domestic investment. The contribution of investment to GDP growth fell in the first quarter of 2019 and is expected to continue declining throughout this year. Inflation should pick up slightly but remain subdued.

Global Equities: The US President Donald Trump said that a US-China trade deal could happen sooner than expected, which offset concern about a congressional impeachment inquiry against Trump.

Indian Economy: Asian Development Bank (ADB) stated that with India's GDP growth weakening considerably in the first quarter (Q1) of fiscal year 2019 (FY2019, ending 31 March 2020), slower growth at 6.5% is now forecast for this year compared to 7.2% estimated earlier. Proactive policy interventions should foster recovery into FY2020, with growth expected to rise to 7.2%, only marginally lower than forecast in ADO 2019. India's Private consumption, which has been a strong driver of growth in recent years, grew by only 3.1% in Q1 of FY2019 - its lowest rate in more than 4 years. Urban consumption was likely affected by subdued wage growth and a credit crunch, while continued rural stress constrained rural consumption. Government consumption remained healthy, however, growing by 8.8%, according to ADB. Securities and Exchange Board of India (SEBI) notified yesterday that it is decided that for arriving at security level pricing, a waterfall approach shall be followed for the valuation of money market and debt securities. AMFI shall ensure that valuation agencies have a documented waterfall approach for valuation of money market and debt securities. The said waterfall approach shall be documented in consultation with SEBI.

Equity Markets: Local market corrected sharply on Wednesday, amid broad based selling pressure. Banks, auto and metals tumbled while most IT shares sailed through the tide. The barometer index, the S&P BSE Sensex, fell 503.62 points or 1.29% to 38,593.52, as per the provisional closing data. The Nifty 50 index fell 148 points or 1.28% to 11,440.20, as per the provisional closing data.

Corporate News: NTPC Ltd signed a Memorandum of Understanding (MoU) with the Himachal Pradesh government to set up two hydro projects totalling 520 MW in the state. Bajaj Auto, the country's third largest two-wheeler maker, has cut prices by as much as Rs 6,000 on its range of motorcycles as part of the upcoming festival offers.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(105.4)	(32.0)	(1.0)
MF(INR cr)	590.1	601.0	409.3

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	42,684	39,401	35,144
F&O(INR cr)	1,570,828	1,495,485	1,318,241

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	17.1	15.8	15.5
NSE VIX	16.2	16.0	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	29,586	(2.0) %	(2.4) %	Energy	15,179	0.5 %	(8.2) %
IT	15,380	0.3 %	(2.9) %	Pharma	7,790	(1.3) %	(16.9) %
Metals	2,420	(2.6) %	(22.0) %	Finance	13,141	(1.9) %	5.1 %
Auto	7,470	(3.9) %	(11.2) %	PSU	2,381	(5.6) %	(29.7) %
FMCG	30,926	(1.2) %	2.4 %	Real Estate	261	(3.1) %	(2.3) %

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>
Power Grid	199	4.4 %	1.6 %	St Bk of I	280	(7.4) %	(13.2) %
Container	600	3.3 %	13.0 %	DLF	156	(6.9) %	(20.4) %
TCS	2,088	2.1 %	2.8 %	Motherson	109	(6.1) %	(29.4) %
NTPC	117	1.5 %	(13.5) %	Tata Motor	123	(6.0) %	(34.3) %
I O C L	141	1.4 %	(11.3) %	Ashok Leyl	71	(5.9) %	(21.7) %

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					

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