



27 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,861	0.1 %	1.6 %
BSE SENSEX	39,592	0.4 %	2.0 %
CNX BANK	31,192	0.1 %	2.9 %
CNX MIDCAP	17,667	0.1 %	(3.6) %
CNX SMALLCAP	6,224	0.3 %	(7.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,537	(0.0) %	13.8 %
S&P 500	2,914	(0.1) %	16.2 %
FTSE 100	7,416	(0.1) %	10.1 %
HANG SENG	28,222	0.1 %	12.3 %
NIKKEI	21,087	(0.5) %	7.8 %
SHANGHAI COMPOSITE	2,976	(0.2) %	20.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.31	(0.2) %	(0.2) %
EUR/USD	1.14	0.2 %	(0.6) %
GBP/USD	1.27	(0.1) %	(0.1) %
USD/JPY	107.10	(0.2) %	(2.3) %
USD/AUD	1.44	(0.5) %	1.1 %
USD/SGD	1.35	(0.2) %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	58	0.0 %	24.3 %
Gold(INR/10g)	33,885	(1.3) %	7.5 %
Gold Comex(USD/oz)	1,423	(0.1) %	10.2 %
SILVER(INR/1Kg)	37,647	(1.0) %	(1.6) %
Aluminium(USD/MT)	1,777	0.0 %	(4.4) %
Copper(USD/MT)	5,986	0.0 %	2.5 %

FIXED INCOME

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

Global Economy: G20 economies implemented 20 new trade-restrictive measures between mid-October 2018 and mid-May 2019, including tariff increases, import bans and new customs procedures for exports, according to WTO. The US Commerce Department said durable goods orders fall by 1.3% in May after plummeting by a revised 2.8% in April. Germany's forward-looking consumer sentiment index drops to 9.8 in July from 10.1 in June, survey data from market research group GfK showed. German income expectations declined noticeably. GfK income expectations index slide 12.2 points to 45.5 in June, testing lowest score since March 2017. GfK economic expectation index rises 0.7 points to 2.4 in June. The economic mood is stabilizing at a low level as the global economic cooling off, on-going discussions around Brexit, and the trade war with the USA are putting a strain on the economic indicator. UK employers' confidence on the economy and their hiring and investment intentions improved since the extension of the Brexit deadline, according to the Jobs Outlook survey from the Recruitment & Employment Confederation or REC. Bank of England Governor Mark Carney says that the response to no deal Brexit would not be automatic. New Zealand central bank leaves its key interest rate unchanged at a record low but hints a rate cut over time to underpin subdued economic growth.

Global Equities: Simmering trade concerns and tepid economic cues weighed on markets. Investors eyed a meeting between the US and Chinese Presidents at the G20 summit this weekend. Bitcoin, the Premier global cryptocurrency jumped near an 18 month high after breaking above \$12000 mark.

Indian Economy: US Secretary of State Michael Pompeo reiterated the priority that he attaches to relations with the US and outlined his vision for the Strategic Partnership in the new tenure of the Government and beyond, building on strong foundation of trust and shared interest. Budget should focus on reviving demand according to the Confederation Of Indian Industries (CII). Enterprises that employ more than a certain number of workers need to be given incentives such as easier finance, graded tax structures, flexibility in labour laws etc, commented Chandrajit Banerjee, Director General of CII. Government removes restrictions on imports of pea seeds though imports are subject to certain conditions, the directorate general of foreign trade (DGFT) stated.

Equity Markets: Local markets edged up further. Metals stocks extend gains on rising Copper prices. Stocks ended with modest gains, with the Nifty closing a tad below 11,850 mark after crossing that level in the intraday moves. S&P BSE Sensex rose 157.14 points or 0.40% to 39,592.08 while the Nifty 50 index gained 51.10 points or 0.43% to 11,847.55.

Corporate News: Tata Consultancy Services has been recognized as a Leader in the June 2019 Gartner Magic Quadrant for Data Center Outsourcing and Hybrid Infrastructure Managed Services, North America. TCS received this position for the fourth year in a row. Infosys Finacle, part of EdgeVerve Systems, a wholly-owned subsidiary of Infosys, and Standard Bank, Africa's biggest lender by asset size, announced the bank's adoption of the Finacle Mobile Teller Solution to digitize its banking services across its branches in the African continent. Dr Lalchandani Labs has entered into an agreement for rendering diagnostic services at Aastha Hospital & IVF Centre at Outer Ring Road, New Delhi. Shriram Transport Finance Company announced that India Ratings and Research have assigned IND AA+/Stable outlook rating for Retail Non Convertible Debentures aggregating Rs 10000 crore.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	349.0	12.2	79.7
MF(INR cr)	938.6	356.9	110.1

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,159	31,812	34,311
F&O(INR cr)	1,338,979	1,326,525	1,218,149

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.3	15.9	15.2
NSE VIX	14.8	14.7	20.0

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,162	1.0 %	2.8 %	Energy	16,192	0.6 %	(2.1) %
IT	16,102	(0.7) %	1.6 %	Pharma	8,086	1.8 %	(13.7) %
Metals	3,023	2.7 %	(2.6) %	Finance	13,532	0.8 %	8.3 %
Auto	7,884	0.1 %	(6.3) %	PSU	3,185	1.9 %	(5.9) %
FMCG	29,524	(0.1) %	(2.2) %	Real Estate	278	1.5 %	4.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
SBI Life I	717	6.4 %	19.9 %	Britannia	2,733	(2.7) %	(10.4) %
DLF	185	4.7 %	(5.6) %	H P C L	288	(2.6) %	1.4 %
Hind.Zinc	241	4.5 %	(15.1) %	Shriram Tr	1,100	(1.7) %	(11.0) %
Vedanta	178	4.4 %	(5.8) %	Interglobe	1,576	(1.7) %	11.2 %
S A I L	53	4.4 %	(4.5) %	Indiabulls	612	(1.5) %	(27.7) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
CFIB Business Barometer (JUN)	27-06-2019	10:00	CAD	-	59.7
Industrial Profits (YoY) (MAY)	27-06-2019	01:30	CNY	-	(0.037)
Euro-Zone Business Climate Indicator (JUN)	27-06-2019	09:00	EUR	-	0.3
Euro-Zone Consumer Confidence (JUN F)	27-06-2019	09:00	EUR	-	(7.2)
Euro-Zone Economic Confidence (JUN)	27-06-2019	09:00	EUR	-	105.1
Euro-Zone Industrial Confidence (JUN)	27-06-2019	09:00	EUR	-	(2.9)
Euro-Zone Services Confidence (JUN)	27-06-2019	09:00	EUR	-	12.2
German Consumer Price Index (MoM) (JUN P)	27-06-2019	12:00	EUR	-	0.002
German Consumer Price Index (YoY) (JUN P)	27-06-2019	12:00	EUR	-	0.014
GfK Consumer Confidence (JUN)	27-06-2019	23:01	GBP	-	(10)
Lloyds Business Barometer (JUN)	27-06-2019	23:01	GBP	-	10
BOJ Wakatabe speaks in Aomori	27-06-2019	01:30	JPY	-	-
Jobless Rate (MAY)	27-06-2019	23:30	JPY	-	0.024
Job-To-Applicant Ratio (MAY)	27-06-2019	23:30	JPY	-	1.63
Tokyo Consumer Price Index (YoY) (JUN)	27-06-2019	23:30	JPY	-	0.011
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JUN)	27-06-2019	23:30	JPY	-	0.011
Tokyo CPI Ex-Fresh Food, Energy (YoY) (JUN)	27-06-2019	23:30	JPY	-	0.008
BOJ Summary of Opinions	27-06-2019	23:50	JPY	-	-
Industrial Production (MoM) (MAY P)	27-06-2019	23:50	JPY	-	0.006
Industrial Production (YoY) (MAY P)	27-06-2019	23:50	JPY	-	(0.011)
Overnight Rate (JUN 27)	27-06-2019	18:00	MXN	-	0.0825
ANZ Activity Outlook (JUN)	27-06-2019	01:00	NZD	-	8.5
ANZ Business Confidence (JUN)	27-06-2019	01:00	NZD	-	(32)
ANZ Consumer Confidence (MoM) (JUN)	27-06-2019	22:00	NZD	-	(0.032)
ANZ Consumer Confidence Index (JUN)	27-06-2019	22:00	NZD	-	119.3
Continuing Claims (JUN 15)	27-06-2019	12:30	USD	-	-
Core PCE (QoQ) (1Q T)	27-06-2019	12:30	USD	-	0.01
Gross Domestic Product Annualized (QoQ) (1Q T)	27-06-2019	12:30	USD	-	0.031
Gross Domestic Product Price Index (1Q T)	27-06-2019	12:30	USD	-	0.000



Initial Jobless Claims (JUN 22)	27-06-2019	12:30	USD	-	-
Personal Consumption (1Q T)	27-06-2019	12:30	USD	-	0.013
Pending Home Sales (MoM) (MAY)	27-06-2019	14:00	USD	-	(0.015)
Pending Home Sales (YoY) (MAY)	27-06-2019	14:00	USD	-	0.004
EIA Natural Gas Storage Change (JUN 21)	27-06-2019	14:30	USD	-	115
Kansas City Fed Manf. Activity (JUN)	27-06-2019	15:00	USD	-	4
U.S. to Sell 4-Week Bills	27-06-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	27-06-2019	15:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	27-06-2019	17:00	USD	-	-

..... End of Report

