



27 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,058	0.0 %	(5.2) %
BSE SENSEX	37,494	2.2 %	(3.5) %
CNX BANK	27,951	0.0 %	(7.8) %
CNX MIDCAP	15,597	0.0 %	(14.9) %
CNX SMALLCAP	5,366	0.0 %	(20.4) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,899	1.1 %	11.0 %
S&P 500	2,878	1.1 %	14.8 %
FTSE 100	7,095	(0.5) %	5.4 %
HANG SENG	25,680	(1.9) %	2.2 %
NIKKEI	20,261	(2.2) %	3.6 %
SHANGHAI COMPOSITE	2,864	(1.2) %	16.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.87	0.6 %	3.5 %
EUR/USD	1.11	0.2 %	(2.9) %
GBP/USD	1.22	0.8 %	(4.0) %
USD/JPY	105.80	(0.7) %	(3.5) %
USD/AUD	1.48	0.4 %	4.1 %
USD/SGD	1.39	0.3 %	1.7 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	0.1 %	16.0 %
Gold(INR/10g)	38,578	2.6 %	22.3 %
Gold Comex(USD/oz)	1,527	(0.0) %	18.3 %
SILVER(INR/1Kg)	45,057	3.1 %	17.8 %
Aluminium(USD/MT)	1,746	0.0 %	(6.0) %
Copper(USD/MT)	5,675	0.0 %	(2.8) %

FIXED INCOME

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

Global Economy: Growth of real gross domestic product (GDP) in the OECD area slowed to 0.5% in the second quarter of 2019, compared with 0.6% in the previous quarter, according to latest estimates. Among the Major Seven economies, GDP growth slowed markedly in the United Kingdom (to minus 0.2% from 0.5% in the previous quarter) and in Germany (to minus 0.1% from 0.4%). GDP growth also decelerated, but more moderately, in the United States and Japan (to 0.5% and 0.4%, respectively, from 0.8% and 0.7% in the previous quarter) and, marginally, in France and Italy (to 0.2% and 0.0%, respectively, from 0.3% and 0.1%). GDP growth also slowed in the European Union and the euro area (to 0.2% compared with 0.5% and 0.4%, respectively, in the previous quarter). Year-on-year GDP growth for the OECD area slowed marginally to 1.6% compared with 1.7% in the previous quarter. Among the Major Seven economies, the United States recorded the highest annual growth of 2.3%. The US Commerce Department said that durable goods orders surged by 2.1% in July following a downwardly revised 1.8% increase in June. German business confidence weakened in August to the lowest since late 2012, survey results from Munich-based Ifo institute showed Monday. The business climate index fell to 94.3 in August from revised 95.8 in July. Japan's leading index, which measures the future economic activity, fell to 93.3 in June from 94.9 in May. This was the lowest since February 2010.

Global Equities: Sentiments revolved around global trade talks. Donald Trump said Monday that China had contacted US trade officials to say they wanted to return to the negotiating table. DOW jumped 1.1%.

Indian Economy: According to data released by the Agriculture Ministry, the total sown area of kharif crops stood at 975.16 lakh hectares (lh) as on 23rd August 2019 compared to 998 lh covered in the corresponding week last year, recording a fall of 2.26% after a deficit of 4.14% in last week. Latest round of FICCI's Economic Outlook Survey puts forth a quarterly median forecast of 6.0% for GDP growth in the first quarter of 2019-20. The growth numbers for the first quarter are expected to be released by Central Statistics Office (CSO) next week.

Equity Markets: Key equity barometers posted robust gains in a highly volatile session. Buying was broad based with financial stocks making the biggest moves. The Nifty opened with a positive gap above 11,000 mark, but soon pared gains in morning trade to hit an intraday low of 10,756.55 before rebinding impressively. Sensex rose 792.96 points or 2.16% to 37,494.12 while Nifty 50 index jumped 228.50 points or 2.11% to 11,057.85.

Corporate News: Drug firm Lupin said its South African arm Pharma Dynamics has signed a commercial agreement with Creso Pharma for hemp oil-based cannaQIX products. India will look at reviewing the pricing of its long-term liquefied natural gas (LNG) deals due to a fall in spot prices, oil minister Dharmendra Pradhan said on Monday. Dilip Buildcon said its board has approved the proposal to divest equity stake in wholly-owned subsidiaries.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(255.0)	(118.0)	8.1
MF(INR cr)	1,628.3	1,025.8	380.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,812	35,731	34,333
F&O(INR cr)	1,513,498	1,501,419	1,277,655

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	19.3	18.8	15.4
NSE VIX	16.7	16.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,951	3.7 %	(7.8) %	Energy	14,407	0.8 %	(12.9) %
IT	15,890	0.5 %	0.3 %	Pharma	7,824	0.6 %	(16.5) %
Metals	2,257	(1.0) %	(27.3) %	Finance	12,564	4.0 %	0.5 %
Auto	7,023	0.5 %	(16.5) %	PSU	2,488	3.6 %	(26.5) %
FMCG	28,708	1.6 %	(4.9) %	Real Estate	254	3.7 %	(5.1) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
L&T Fin.Ho	96	6.8 %	(36.9) %	Vodafone I	6	(4.3) %	(69.0) %
Yes Bank	63	6.2 %	(77.2) %	P & G Hygi	9,944	(3.4) %	(7.8) %
H P C L	252	5.9 %	(11.0) %	JSW Steel	214	(3.0) %	(26.8) %
Piramal En	1,881	5.7 %	(30.2) %	Tata Steel	338	(2.1) %	(36.8) %
Adani Port	368	5.4 %	(3.9) %	Sun Pharma	419	(2.0) %	(12.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA's Debelle Gives Speech in Canberra	27-08-2019	02:50	AUD	-	-
Industrial Profits (YoY) (JUL)	27-08-2019	01:30	CNY	-	-
German Capital Investment (2Q)	27-08-2019	06:00	EUR	-	-
German Government Spending (2Q)	27-08-2019	06:00	EUR	-	-
German Gross Domestic Product n.s.a. (YoY) (2Q F)	27-08-2019	06:00	EUR	-	-
German Gross Domestic Product s.a. (QoQ) (2Q F)	27-08-2019	06:00	EUR	-	-
German Gross Domestic Product w.d.a. (YoY) (2Q F)	27-08-2019	06:00	EUR	-	-
German Private Consumption (2Q)	27-08-2019	06:00	EUR	-	-
BBA Loans for House Purchase (JUL)	27-08-2019	08:30	GBP	-	-
ECB's De Guindos, BOE's Tenreiro Speak on Monetary Policy	27-08-2019	12:00	GBP	-	-
BRC Shop Price Index (YoY) (AUG)	27-08-2019	23:01	GBP	-	-
House Price Index (MoM) (JUN)	27-08-2019	13:00	USD	-	-
House Price Purchase Index (QoQ) (2Q)	27-08-2019	13:00	USD	-	-
S&P CoreLogic CS 20-City (MoM) SA (JUN)	27-08-2019	13:00	USD	-	-
S&P/Case-Shiller 20-City Index n.s.a (JUN)	27-08-2019	13:00	USD	-	-
S&P/Case-Shiller Composite-20 (YoY) (JUN)	27-08-2019	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (JUN)	27-08-2019	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (YoY) (JUN)	27-08-2019	13:00	USD	-	-
Conf. Board Expectations (AUG)	27-08-2019	14:00	USD	-	-
Conf. Board Present Situation (AUG)	27-08-2019	14:00	USD	-	-
Consumer Confidence Index (AUG)	27-08-2019	14:00	USD	-	-
Richmond Fed Manufact. Index (AUG)	27-08-2019	14:00	USD	-	-
U.S. to Sell USD40 Bln 2-Year Notes	27-08-2019	15:30	USD	-	-

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