



27 Sep.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,056	0.0 %	8.3 %
BSE SENSEX	36,542	(0.3) %	10.2 %
CNX BANK	25,338	(0.2) %	4.1 %
CNX MIDCAP	17,882	(0.2) %	(6.4) %
CNX SMALLCAP	6,658	0.1 %	(16.0) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,385	(0.4) %	6.3 %
S&P 500	2,906	(0.3) %	7.8 %
FTSE 100	7,511	0.1 %	(1.8) %
HANG SENG	27,817	1.2 %	(8.8) %
NIKKEI	24,034	0.4 %	2.2 %
SHANGHAI COMPOSITE	2,807	0.9 %	(16.2) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	72.62	(0.0) %	14.0 %
EUR/USD	1.17	0.1 %	(2.2) %
GBP/USD	1.31	0.3 %	(2.7) %
USD/JPY	112.79	(0.0) %	0.1 %
USD/AUD	1.38	(0.3) %	7.6 %
USD/SGD	1.37	(0.1) %	2.3 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	(1.0) %	18.6 %
Gold(INR/10g)	30,672	(0.2) %	4.5 %
Gold Comex(USD/oz)	1,202	(0.3) %	(8.1) %
SILVER(INR/1Kg)	37,480	1.1 %	(2.9) %
Aluminium(USD/MT)	2,057	1.8 %	(8.8) %
Copper(USD/MT)	6,258	(0.3) %	(12.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.0) %	0.6 %

Global Economy: The US Fed policymakers lifted the benchmark overnight lending rate by a quarter of a percentage point to a range of 2.00% to 2.25%. The US central bank still foresees another rate hike in December, three more next year, and one increase in 2020. The Asian Development Bank (ADB) maintained its developing Asia growth outlook for this year, but trimmed its projection for next year on escalating trade tensions. In an update of its flagship annual economic publication, the Asian Development Outlook, the bank said growth remains stable across most of developing Asia due to robust domestic demand, buoyant oil and gas prices, and a consolidation of India's growth rebound. According to the ADB, the region will grow 6% this year and by 5.8% next year. While the forecast for 2018 was maintained, the outlook for next year was trimmed from 5.9% earlier. UK retailers reported a slower pace of growth in sales volumes in September and expect it to remain so again next month, the latest Distributive Trades Survey from the Confederation of British Industry showed Wednesday. The retail sales balance fell to 23% in September from 29% in August.

Global Equities: Investors were cautious after the US Federal Reserve's decision on interest rates. Commodities also slipped on profit selling.

Indian Economy: As per the First Advance Estimates, total production of Kharif Foodgrains during 2018-19 is estimated at 141.59 million tonnes. This is higher by 0.86 million tonnes as compared to last year's Kharif foodgrains production of 140.73 million tonnes. Further, kharif foodgrain production is 11.94 million tonnes more than the average production of five years (2012-13 to 2016-17) of 129.65 million tonnes. The cumulative rainfall in the country during the monsoon season i.e. 01st June to 12th September, 2018 has been 8% lower than Long Period Average (LPA).

Equity Markets: Local stocks yet again saw some selling pressure. Key equity indices resumed decline after previous session's gains, weighed down by IT and FMCG shares. The Nifty managed to stay afloat above the key 11,000 level. Benchmarks traded with a negative bias for most part of the session as volatility crept in a day ahead of expiry of derivative contracts for the month of September.

Corporate News: Reliance Industrial Investments & Holdings, the wholly owned subsidiary of Reliance Industries has subscribed to 40,58,647 Compulsorily Convertible Preferred Shares of NetraDyne Inc., USA (NetraDyne) at USD 1.97110 per share, for cash aggregating to USD 8 million. IZMO announced that under its (proposed) wholly owned subsidiary company, Hughes Precision Manufacturing, the company has received the license to Manufacture and Proof Test Military Calibre Ammunition under the Arms Act, 1959 and the Arms Rules, 2016 from the Ministry of Home Affairs. Sugar stocks could be in focus as spot Sugar prices extended recent gains following media reports that state government has decided to provide soft loans worth Rs 4000 crore to sugar mills through the nationalised and other banks. Maruti Suzuki India has partnered with Zydus Hospitals, a leading provider of healthcare services, to set up a modern Polyclinic (Health centre) facility at Becharaji. India's economy continues on a robust growth path, the Asian Development Bank (ADB) said Wednesday. However, depreciation of the rupee and volatile external financial markets pose challenges, the multilateral lending agency added, in an update of its flagship annual economic publication, the Asian Development Outlook (ADO) 2018.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(505.7)	(71.3)	(32.4)
MF(INR cr)	1,544.1	512.3	383.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,727	41,067	34,739
F&O(INR cr)	1,229,901	1,325,974	949,592

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.4	13.0	14.1
NSE VIX	17.1	14.8	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,376	0.2 %	4.3 %	Energy	15,704	1.1 %	18.2 %
IT	15,932	(1.9) %	25.4 %	Pharma	10,289	0.4 %	19.4 %
Metals	3,694	1.7 %	4.4 %	Finance	10,704	0.2 %	4.3 %
Auto	10,002	(1.0) %	(9.6) %	PSU	2,749	(1.9) %	(3.7) %
FMCG	29,683	(1.5) %	12.0 %	Real Estate	237	2.4 %	(20.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bharat Ele	84	10.5 %	(41.8) %	Oracle Fin	3,961	(3.4) %	0.6 %
Indiabulls	1,000	7.5 %	(19.6) %	Tata Motor	123	(3.1) %	(35.0) %
UPL	698	5.5 %	(7.3) %	Tata Motor	233	(3.1) %	(31.2) %
Vedanta	242	4.8 %	(14.4) %	Bharti Inf	262	(2.9) %	(22.6) %
NMDC	117	3.5 %	(0.5) %	Wipro	319	(2.8) %	10.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Job Vacancies (AUG)	27-09-2018	01:30	AUD	-	0.057
CFIB Business Barometer (SEP)	27-09-2018	10:00	CAD	-	61.6
Poloz Speech in New Brunswick	27-09-2018	21:45	CAD	-	-
Swift Global Payments CNY (AUG)	27-09-2018	01:00	CNY	-	0.0204
Industrial Profits (YoY) (AUG)	27-09-2018	01:30	CNY	-	0.162
German GfK Consumer Confidence (OCT)	27-09-2018	06:00	EUR	-	10.5
ECB Publishes Economic Bulletin	27-09-2018	08:00	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (AUG)	27-09-2018	08:00	EUR	-	0.04
Euro-Zone Business Climate Indicator (SEP)	27-09-2018	09:00	EUR	-	1.22
Euro-Zone Consumer Confidence (SEP F)	27-09-2018	09:00	EUR	-	(2.9)
Euro-Zone Economic Confidence (SEP)	27-09-2018	09:00	EUR	-	111.6
Euro-Zone Industrial Confidence (SEP)	27-09-2018	09:00	EUR	-	5.5
Euro-Zone Services Confidence (SEP)	27-09-2018	09:00	EUR	-	14.7
German Consumer Price Index (MoM) (SEP P)	27-09-2018	12:00	EUR	-	0.001
German Consumer Price Index (YoY) (SEP P)	27-09-2018	12:00	EUR	-	0.02
ECB President Draghi Addresses ESRB Conference in Frankfurt	27-09-2018	13:30	EUR	-	-
ECB's Praet Speaks at King's College London	27-09-2018	17:00	EUR	-	-
BOE's Haldane speaks in London	27-09-2018	11:45	GBP	-	-
BOE's Carney chairs panel in Frankfurt.	27-09-2018	14:00	GBP	-	-
GfK Consumer Confidence (SEP)	27-09-2018	23:01	GBP	-	(7)
Lloyds Business Barometer (SEP)	27-09-2018	23:01	GBP	-	23
BOJ Outright Bond Purchase 1~3 Years	27-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	27-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	27-09-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	27-09-2018	01:10	JPY	-	-
BOJ Kuroda speaks in Tokyo	27-09-2018	06:35	JPY	-	-
Jobless Rate (AUG)	27-09-2018	23:30	JPY	-	0.025
Job-To-Applicant Ratio (AUG)	27-09-2018	23:30	JPY	-	1.63
Taiwan Consumer Price Index (MoM) (SEP)	27-09-2018	23:30	USD	-	0.012



Tokyo Consumer Price Index Ex-Fresh Food (YoY) (SEP)	27-09-2018	23:30	JPY	-	0.009
Tokyo CPI Ex-Fresh Food, Energy (YoY) (SEP)	27-09-2018	23:30	JPY	-	0.006
BOJ Summary of Opinions	27-09-2018	23:50	JPY	-	-
Foreign Buying Japan Bonds (SEP 21)	27-09-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (SEP 21)	27-09-2018	23:50	JPY	-	-
Industrial Production (MoM) (AUG P)	27-09-2018	23:50	JPY	-	(0.001)
Industrial Production (YoY) (AUG P)	27-09-2018	23:50	JPY	-	0.022
Japan Buying Foreign Bonds (Yen) (SEP 21)	27-09-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (SEP 21)	27-09-2018	23:50	JPY	-	-
Large Retailers' Sales (AUG)	27-09-2018	23:50	JPY	-	(0.016)
Retail Trade (YoY) (AUG)	27-09-2018	23:50	JPY	-	0.015
Retail Trade s.a. (MoM) (AUG)	27-09-2018	23:50	JPY	-	0.001
Building Permits (MoM) (AUG)	27-09-2018	22:45	NZD	-	(0.103)
Advance Goods Trade Balance (AUG)	27-09-2018	12:30	USD	-	-
Cap Goods Orders Nondef Ex Air (AUG P)	27-09-2018	12:30	USD	-	0.016
Cap Goods Ship Nondef Ex Air (AUG P)	27-09-2018	12:30	USD	-	0.01
Continuing Claims (SEP 15)	27-09-2018	12:30	USD	-	-
Core Personal Consumption Expenditure (QoQ) (2Q T)	27-09-2018	12:30	USD	-	0.02
Durable Goods Orders (AUG P)	27-09-2018	12:30	USD	-	(0.017)
Durables Ex Transportation (AUG P)	27-09-2018	12:30	USD	-	0.001
Gross Domestic Product Annualized (QoQ) (2Q T)	27-09-2018	12:30	USD	-	0.042
Gross Domestic Product Price Index (2Q T)	27-09-2018	12:30	USD	-	0.03
Initial Jobless Claims (SEP 22)	27-09-2018	12:30	USD	-	-
Personal Consumption (2Q T)	27-09-2018	12:30	USD	-	0.038
Retail Inventories (MoM) (AUG)	27-09-2018	12:30	USD	-	0.004
Wholesale Inventories (MoM) (AUG P)	27-09-2018	12:30	USD	-	0.006
Pending Home Sales (MoM) (AUG)	27-09-2018	14:00	USD	-	(0.007)
Pending Home Sales (YoY) (AUG)	27-09-2018	14:00	USD	-	(0.005)
EIA Natural Gas Storage Change (SEP 21)	27-09-2018	14:30	USD	-	-
EIA Working Natural Gas Implied Flow (SEP 21)	27-09-2018	14:30	USD	-	-
Kansas City Fed Manf. Activity (SEP)	27-09-2018	15:00	USD	-	14
U.S. to Sell 7-Year Notes	27-09-2018	17:00	USD	-	-
Fed's Kaplan Speaks at Forum for Minority Banking	27-09-2018	18:00	USD	-	-
Powell Makes Brief Remarks on U.S. Economy at Senate Event	27-09-2018	20:30	USD	-	-

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