



27 Sep.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,571	1.1 %	(0.8) %
BSE SENSEX	38,990	1.0 %	0.3 %
CNX BANK	30,003	1.4 %	(1.1) %
CNX MIDCAP	16,450	0.8 %	(10.3) %
CNX SMALLCAP	5,751	0.6 %	(14.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,891	(0.3) %	15.3 %
S&P 500	2,978	(0.2) %	18.8 %
FTSE 100	7,351	0.8 %	9.2 %
HANG SENG	26,042	0.4 %	3.6 %
NIKKEI	22,048	0.1 %	12.7 %
SHANGHAI COMPOSITE	2,929	(0.9) %	18.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.73	0.0 %	1.9 %
EUR/USD	1.09	(0.6) %	(4.5) %
GBP/USD	1.23	(0.9) %	(3.1) %
USD/JPY	107.70	0.2 %	(1.8) %
USD/AUD	1.48	0.5 %	4.2 %
USD/SGD	1.38	0.3 %	1.2 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.7) %	21.1 %
Gold(INR/10g)	37,622	(1.0) %	19.3 %
Gold Comex(USD/oz)	1,516	(1.5) %	17.4 %
SILVER(INR/1Kg)	45,869	(3.2) %	19.9 %
Aluminium(USD/MT)	1,736	(0.9) %	(6.6) %
Copper(USD/MT)	5,719	(0.7) %	(2.1) %

**FIXED INCOME**

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

**Global Economy:** US National Association of Realtors said its pending home sales index surged by 1.6% to 107.3 in August after plunging by 2.5% to 105.6 in July. Eurozone money supply rose at a faster pace in August, the European Central Bank reported Thursday. The broad monetary aggregate M3 rose 5.7% year-on-year in August, faster than the 5.1% increase recorded in July. The annual growth rate of credit to the private sector increased to 3.1% in August from 2.9% in July. German consumer sentiment is likely to improve in October as stimulus measures announced by the European Central Bank boosted the propensity to buy, survey data from market research group GfK showed Thursday. The forward-looking consumer sentiment index edged up to 9.9 in October from 9.7 in September. UK car production rose for the first time in 15 months in August, data released by the Society of Motor Manufacturers and Traders showed on Thursday. Car production grew 3.3% on a yearly basis in August as factories kept production lines active throughout the month after they brought forward planned summer shutdowns to April in preparation for the original Brexit deadline. Australia's job vacancies fell by seasonally adjusted 1.9% sequentially in the August quarter, following a 1.6% fall in May. Singapore's industrial production declined in August, data from the Economic Development Board showed. Manufacturing output dropped 8% year-on-year in August, following a 0.1% drop in July.

**Global Equities:** US stocks eased on reports that United States is unlikely to extend a waiver allowing American firms to supply China's Huawei. Markets also remained worried over an inquiry into the impeachment of President Donald Trump.

**Indian Economy:** The 5th session of the South Asian Climate Outlook Forum (SASCOF-15) has extended a normal outlook for North-East monsoon for India this year, according to media reports. Above normal rainfall is likely during the October to November season for most parts of Sri Lanka, Maldives and the eastern parts of Myanmar. The 9th India-China Financial dialogue noted that India and China bilateral relationship has entered into a new era after the historic informal summit between Prime Minister of India and China's President held in Wuhan in April 2018. During this dialogue, both sides had in-depth exchange of views on macroeconomic situation & policy, cooperation in multilateral framework, bilateral investment and financial cooperation. Prime Minister of India Narendra Modi chaired an exclusive round-table discussion, at New York, with 42 global captains of industry from across 20 sectors. The Prime Minister stressed upon continued political stability, predictability of policy, and pro-development and pro-growth policies.

**Equity Markets:** Local market ended with strong gains on Thursday, supported by easing crude oil prices and positive news on the US-China trade war front. Banks and metal shares were in demand. The Nifty ended above 11,550 mark. Positive domestic jobs data also triggered buying. Around 14.24 lakh jobs were created in July, higher than 12.49 lakh in the previous month, according to a latest payroll data from Employees' State Insurance Corporation (ESIC). Gross enrolments of new subscribers with the ESIC were 1.49 crore during 2018-19, National Statistical Office (NSO) said in a report. S&P BSE Sensex rose 396.22 points or 1.03% to 38,989.74, as per the provisional closing data. The Nifty 50 index rose 139.80 points or 1.22% to 11,573.30, as per the provisional closing data.

**Corporate News:** IT counters could see some corrective action as the Indian Rupee firmed up further yesterday amid a good recovery in local stocks. The INR closed at 70.88 per US dollar, up 16 basis points. ITI Limited launched its cloud services and solutions platform for central and state government entities, banks, public sector undertakings, small and medium enterprises and Start Ups in India. Budget airline SpiceJet will launch 46 new non-stop flights on its domestic network next month. According to the airline, the new flights will begin in phases starting October 27.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	(49.6)	(33.1)	(1.4)
MF(INR cr)	1,285.1	647.3	415.2

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	54,061	40,263	35,301
F&O(INR cr)	3,343,697	1,604,204	1,335,120

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	16.0	15.8	15.6
NSE VIX	16.3	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	30,003	1.4 %	(1.1) %	Energy	15,447	1.8 %	(6.6) %
IT	15,313	(0.4) %	(3.3) %	Pharma	7,857	0.9 %	(16.2) %
Metals	2,520	4.2 %	(18.8) %	Finance	13,288	1.1 %	6.3 %
Auto	7,660	2.5 %	(9.0) %	PSU	2,398	0.7 %	(29.1) %
FMCG	31,028	0.3 %	2.8 %	Real Estate	268	2.6 %	0.2 %

### 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>
HPCL	305	6.7 %	7.3 %	Yes Bank	51	(4.9) %	(81.5) %
Vedanta	166	6.3 %	(12.1) %	Indiabulls	414	(2.4) %	(51.2) %
NMDC	91	6.2 %	(13.7) %	Vodafone I	5	(1.9) %	(70.7) %
M & M	567	6.0 %	(14.2) %	Havells In	720	(1.5) %	(7.2) %
Hind.Zinc	213	5.6 %	(25.0) %	Cadila Hea	246	(1.4) %	(28.6) %

### 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>					

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