



28 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,652	(0.2) %	4.3 %
BSE SENSEX	35,217	(0.8) %	5.9 %
CNX BANK	26,393	(0.1) %	8.5 %
CNX MIDCAP	18,032	(0.8) %	(5.6) %
CNX SMALLCAP	7,094	(0.8) %	(10.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,118	(0.7) %	(2.8) %
S&P 500	2,700	(0.9) %	0.1 %
FTSE 100	7,622	1.1 %	(0.3) %
HANG SENG	28,356	(1.8) %	(7.1) %
NIKKEI	22,272	(0.3) %	(5.3) %
SHANGHAI COMPOSITE	2,813	(1.1) %	(16.0) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.63	0.6 %	7.8 %
EUR/USD	1.16	(0.7) %	(3.7) %
GBP/USD	1.31	(0.8) %	(3.0) %
USD/JPY	110.11	0.3 %	(2.3) %
USD/AUD	1.36	0.2 %	6.3 %
USD/SGD	1.37	0.3 %	2.4 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	3.2 %	20.5 %
Gold(INR/10g)	30,536	0.5 %	4.0 %
Gold Comex(USD/oz)	1,254	(0.3) %	(4.2) %
SILVER(INR/1Kg)	39,554	0.3 %	2.5 %
Aluminium(USD/MT)	2,205	2.4 %	(2.3) %
Copper(USD/MT)	6,688	(0.4) %	(6.9) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.1) %	0.4 %

Global Economy: The US Commerce Department on Wednesday showed a smaller than expected decrease in new orders for US manufactured durable goods in the month of May. The Commerce Department said durable goods orders fell by 0.6% in May after tumbling by a revised 1% in April. China's industrial profit surged 21.1% year-over-year in May, slower than the 21.9% increase in April, data from the National Bureau of Statistics showed Wednesday. In the first five months of this year, industrial profits advanced 16.5% annually compared with a 15% gain in the first four months. UK house prices grew 2% year-on-year in June, following May's 2.4% increase, data from Nationwide Building Society showed Wednesday. On a monthly basis, house prices rebounded 0.5% after falling 0.2% in May.

Global Equities: Modest gains emerged though broad trends are dicey as investors are worried about trade tensions between the US and major trading partners such as China and the European Union.

Indian Economy: Minister for Commerce & Industry and Civil Aviation, Suresh Prabhu took stock of the latest export trends and expressed confidence over robust growth of total exports by 12.9% in 2017-18. He said that trade events are being organised in African, Central and South American countries to find new markets for exports and to introduce new products. Because of these measures, exports are continuously registering growth.

Equity Markets: Key benchmark indices declined sharply tracking weakness in other Asian stocks. Domestic stocks were weighed down by escalating global trade tension between the world's biggest economic powers. Domestic stocks opened on a flat note. Key benchmark indices nudged higher in morning trade. Volatility struck bourses in mid-morning trade as the key benchmark indices erased entire intraday gains and were trading a tad lower. Key benchmark indices extended slide as the day's trading session progressed. A selling frenzy in late trade pulled indices to intraday low in late trade.

Corporate News: Indian Rupee fell near 68.60- its weakest level in 19 months. This can support IT firms as a weak rupee boosts revenue of IT firms in rupee terms as the sector derives a lion's share of revenue from exports. India signed a MoU with Germany on Cooperation in the field of Civil Aviation. The MoU is an important landmark in the civil aviation relations between India and Germany, and has the potential to spur greater trade, investment, tourism, and cultural exchanges between the two countries. Karnataka Bank has raised interest rates on its Domestic and NRE Rupee term deposits by 10 basis points for a period of 1 year to 2 years with a hike in interest rate from 7.25% to 7.35% (for deposits upto Rs 10 crore).



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(60.7)	(30.0)	(48.4)
MF(INR cr)	616.3	386.5	492.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,402	29,156	32,925
F&O(INR cr)	1,264,849	853,647	825,510

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.9	13.4	15.2
NSE VIX	13.5	12.8	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,423	(0.7) %	8.6 %	Energy	13,247	(2.5) %	(0.3) %
IT	14,018	0.5 %	10.3 %	Pharma	9,263	0.2 %	7.5 %
Metals	3,342	(1.3) %	(5.6) %	Finance	11,046	(0.9) %	7.6 %
Auto	10,716	(1.3) %	(3.1) %	PSU	2,809	(2.4) %	(1.6) %
FMCG	28,625	(0.6) %	8.0 %	Real Estate	271	(1.8) %	(8.5) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tech Mahin	714	3.8 %	11.5 %	B P C L	383	(7.8) %	(9.6) %
Bharti Inf	300	2.3 %	(11.3) %	H P C L	277	(7.5) %	(19.7) %
Dabur Indi	394	1.8 %	17.1 %	I O C L	156	(6.7) %	(8.7) %
Godrej Con	1,209	1.5 %	8.4 %	Power Fin.	76	(6.1) %	(13.2) %
Aurobindo	616	1.4 %	4.0 %	Rural Elec	103	(4.5) %	(19.8) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Job vacancies (MAY)	28-06-2018	01:30	AUD	-	0.044
Swift Global Payments CNY (MAY)	28-06-2018	01:00	CNY	-	0.017
German GfK Consumer Confidence (JUL)	28-06-2018	06:00	EUR	-	10.7
ECB Publishes Economic Bulletin	28-06-2018	08:00	EUR	-	-
Euro-Zone Business Climate Indicator (JUN)	28-06-2018	09:00	EUR	-	1.45
Euro-Zone Consumer Confidence (JUN F)	28-06-2018	09:00	EUR	-	(0.5)
Euro-Zone Economic Confidence (JUN)	28-06-2018	09:00	EUR	-	112.5
Euro-Zone Industrial Confidence (JUN)	28-06-2018	09:00	EUR	-	6.8
Euro-Zone Services Confidence (JUN)	28-06-2018	09:00	EUR	-	14.3
German Consumer Price Index (MoM) (JUN P)	28-06-2018	12:00	EUR	-	0.005
German Consumer Price Index (YoY) (JUN P)	28-06-2018	12:00	EUR	-	0.022
BOE's Bailey Speaks on the Future of Payments in London	28-06-2018	10:00	GBP	-	-
BOE Chief Economist Andy Haldane Speaks in London	28-06-2018	13:30	GBP	-	-
GfK Consumer Confidence (JUN)	28-06-2018	23:01	GBP	-	(7)
Lloyds Business Barometer (JUN)	28-06-2018	23:01	GBP	-	35
Jobless Rate (MAY)	28-06-2018	23:30	JPY	-	0.025
Job-To-Applicant Ratio (MAY)	28-06-2018	23:30	JPY	-	1.59
Tokyo Consumer Price Index (YoY) (JUN)	28-06-2018	23:30	JPY	-	0.004
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (JUN)	28-06-2018	23:30	JPY	-	0.005
Tokyo CPI Ex-Fresh Food, Energy (YoY) (JUN)	28-06-2018	23:30	JPY	-	0.002
Industrial Production (MoM) (MAY P)	28-06-2018	23:50	JPY	-	0.005
Industrial Production (YoY) (MAY P)	28-06-2018	23:50	JPY	-	0.026
Loans & Discounts Corp (YoY) (MAY)	28-06-2018	23:50	JPY	-	0.028
ANZ Consumer Confidence (MoM) (JUN)	28-06-2018	22:00	NZD	-	0.004
ANZ Consumer Confidence Index (JUN)	28-06-2018	22:00	NZD	-	121
Building Permits (MoM) (MAY)	28-06-2018	22:45	NZD	-	(0.037)
Continuing Claims (JUN 16)	28-06-2018	12:30	USD	-	-
Core PCE (QoQ) (1Q T)	28-06-2018	12:30	USD	-	0.023
Core Domestic Product Annualized (QoQ) (1Q T)	28-06-2018	12:30	USD	-	0.023



Gross Domestic Product Price Index (1Q T)	28-06-2018	12:30	USD	-	0.019
Initial Jobless Claims (JUN 23)	28-06-2018	12:30	USD	-	-
Personal Consumption (1Q T)	28-06-2018	12:30	USD	-	0.01
EIA Natural Gas Storage Change (JUN 22)	28-06-2018	14:30	USD	-	91
EIA Working Natural Gas Implied Flow (JUN 22)	28-06-2018	14:30	USD	-	91
Fed's Bullard Speaks on U.S. Economy and Monetary Policy	28-06-2018	14:45	USD	-	-
Kansas City Fed Manf. Activity (JUN)	28-06-2018	15:00	USD	-	29
Fed's Bostic to Meet With Fed Up Coalition in Atlanta	28-06-2018	16:00	USD	-	-
U.S. to Sell USD30 Bln 7-Year Notes	28-06-2018	17:00	USD	-	-

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