



28 Jun.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,859	0.2 %	1.6 %
BSE SENSEX	39,586	(0.0) %	1.9 %
CNX BANK	31,203	(0.2) %	2.9 %
CNX MIDCAP	17,706	(0.1) %	(3.4) %
CNX SMALLCAP	6,221	0.1 %	(7.7) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,527	(0.0) %	13.7 %
S&P 500	2,925	0.4 %	16.7 %
FTSE 100	7,402	(0.2) %	9.9 %
HANG SENG	28,621	1.4 %	13.9 %
NIKKEI	21,338	1.2 %	9.1 %
SHANGHAI COMPOSITE	2,997	0.7 %	21.6 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	69.32	(0.1) %	(0.2) %
EUR/USD	1.14	(0.2) %	(0.7) %
GBP/USD	1.27	(0.4) %	(0.5) %
USD/JPY	107.62	0.2 %	(1.8) %
USD/AUD	1.43	(0.3) %	0.8 %
USD/SGD	1.35	0.0 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	59	2.7 %	27.6 %
Gold(INR/10g)	33,849	(0.1) %	7.4 %
Gold Comex(USD/oz)	1,413	(0.6) %	9.5 %
SILVER(INR/1Kg)	37,526	(0.3) %	(1.9) %
Aluminium(USD/MT)	1,803	1.5 %	(3.0) %
Copper(USD/MT)	6,006	0.3 %	2.9 %

FIXED INCOME

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

Global Economy: US economic growth in the first quarter was unrevised from the previous estimate, a report released by the Commerce Department on Thursday showed. The Commerce Department said real gross domestic product increased at an annual rate of 3.1 percent in the first quarter, unrevised from the estimate released last month. The unrevised rate of GDP growth in the first quarter still reflects a significant acceleration from the 2.2 percent increase seen in the fourth quarter of 2018. China's industrial profits recovered in May, data from the National Bureau of Statistics reveals. Industrial profits increase 1.1% year-on-year in May, reversing a 3.7% drop in April. During January to May, China's industrial profits fall 2.3% compared to the same period last year. Profits had decreased 3.4% in January to April period. Eurozone economic sentiment index dropped to 103.3 in June from 105.2 in May, survey data from the European Commission show. The industrial sentiment index declined to -5.6 from -2.9 a month ago. Eurozone consumer sentiment indicator slid to -7.2 from -6.5 in the previous month. UK car production plunged 15.5% or 21,239 units on a yearly basis in May, for the twelfth straight month on sharp contractions in domestic demand and exports, data from the Society of Motor Manufacturers and Traders, or SMMT, showed. Bank of Japan will continue with the monetary easing for as long as it is necessary to achieve the 2% inflation target in a sustainable manner, Deputy Governor Masazumi Wakatabe said. Retail sales in Japan rose a seasonally adjusted 0.3% month on month in May following the downwardly revised 0.1% drop in April.

Global Equities: US Treasury Secretary Steven Mnuchin said that a trade deal with China was around 90% complete. However, investors are eyeing a meeting between the US and Chinese Presidents at the G20 summit this weekend.

Indian Economy: US President Donald Trump has demanded India withdraw retaliatory tariffs imposed this month, calling the duties unacceptable. MSME industry should come up with 'special proposals,' and suggest steps required to be taken by the government to increase production, boost exports and enable domestic enterprises to withstand global competition, Union Minister of State for Commerce and Industry, Som Parkash says. India's logistics sector is highly defragmented and government is aiming to reduce the logistics cost from the present 14% of GDP to less than 10% by 2022 says an official release. India's monsoon rains were 24% below average in the week ended June 26, the Indian Meteorological Department (IMD) stated.

Equity Markets: Local stocks ended with tiny losses after a volatile trading session as global cues turned mixed. Selling pressure was seen on higher levels as the June 2019 F&O contracts expired. Local traders rolled over positions in the F&O segment from the near month June 2019 series to July 2019 series. S&P BSE Sensex fell 5.67 points or 0.01% to 39,586.41 while the Nifty 50 index eased 6 points or 0.05% to 11,841.55.

Corporate News: Infosys McCamish, a US based subsidiary of Infosys BPM and a leading developer of solutions and services in the insurance and financial services industry today announced its partnership with Pan-American Life Insurance Group (PALIG), a leading provider of life, accident and health insurance. As part of the partnership, Infosys McCamish will provide policy administration services for PALIG's new Global Assets Indexed Universal Life (IUL) product. Sun Pharmaceuticals Industries announced that one of its wholly owned subsidiaries has entered into a licensing agreement with a subsidiary of China Medical System Holdings for the development and commercialization of Tildrakizumab, an innovative biologic product. KIOCL has signed two MoUs at METEC- 2019 at Dusseldorf, Germany for Sale of Pellets in European Market including UK.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	28.9	13.2	78.8
MF(INR cr)	527.7	367.0	117.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,310	32,506	34,480
F&O(INR cr)	2,655,700	1,400,368	1,242,515

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	16.2	15.9	15.2
NSE VIX	14.7	14.7	19.9

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	31,270	0.3 %	3.1 %	Energy	16,142	(0.3) %	(2.4) %
IT	15,992	(0.7) %	1.0 %	Pharma	8,088	0.0 %	(13.7) %
Metals	3,014	(0.3) %	(2.8) %	Finance	13,595	0.5 %	8.8 %
Auto	7,971	1.1 %	(5.3) %	PSU	3,184	(0.0) %	(5.9) %
FMCG	29,487	(0.1) %	(2.3) %	Real Estate	283	1.9 %	6.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	82	4.1 %	(11.5) %	Tech Mahin	702	(2.2) %	(10.6) %
Siemens	1,294	3.3 %	14.4 %	Adani Port	407	(2.0) %	6.1 %
Piramal En	1,941	3.2 %	(27.9) %	Biocon	248	(1.7) %	(19.8) %
HDFC Life	455	3.0 %	18.6 %	UPL	944	(1.6) %	1.0 %
Tata Motor	166	2.9 %	(11.5) %	Reliance I	1,274	(1.5) %	(8.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (MAY)	28-06-2019	01:30	AUD	-	0.002
Private Sector Credit (YoY) (MAY)	28-06-2019	01:30	AUD	-	0.037
Gross Domestic Product (MoM) (APR)	28-06-2019	12:30	CAD	-	0.005
Gross Domestic Product (YoY) (APR)	28-06-2019	12:30	CAD	-	0.014
Industrial Product Price (MoM) (MAY)	28-06-2019	12:30	CAD	-	0.008
Raw Materials Price Index (MoM) (MAY)	28-06-2019	12:30	CAD	-	0.056
Bank of Canada Senior Loan Officer Survey (2Q)	28-06-2019	14:30	CAD	-	(2.7)
BoC Overall Business Outlook Survey (2Q)	28-06-2019	14:30	CAD	-	(0.6)
Business Outlook Future Sales (2Q)	28-06-2019	14:30	CAD	-	6
KOF Leading Indicator (JUN)	28-06-2019	07:00	CHF	-	94.4
German Import Price Index (MoM) (MAY)	28-06-2019	06:00	EUR	-	0.003
German Import Price Index (YoY) (MAY)	28-06-2019	06:00	EUR	-	0.014
Euro-Zone Consumer Price Index Core (YoY) (JUN A)	28-06-2019	09:00	EUR	-	0.008
Euro-Zone Consumer Price Index Estimate (YoY) (JUN)	28-06-2019	09:00	EUR	-	0.012
Current Account Balance (1Q)	28-06-2019	08:30	GBP	-	-
Gross Domestic Product (QoQ) (1Q F)	28-06-2019	08:30	GBP	-	0.005
Gross Domestic Product (YoY) (1Q F)	28-06-2019	08:30	GBP	-	0.018
Total Business Investment (QoQ) (1Q F)	28-06-2019	08:30	GBP	-	0.005
Total Business Investment (YoY) (1Q F)	28-06-2019	08:30	GBP	-	(0.014)
BOJ Outright Bond Purchase 10~25 Years	28-06-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	28-06-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	28-06-2019	01:10	JPY	-	-
Vehicle Production (YoY) (APR)	28-06-2019	04:00	JPY	-	(0.041)
Annualized Housing Starts (MAY)	28-06-2019	05:00	JPY	-	-
Construction Orders (YoY) (MAY)	28-06-2019	05:00	JPY	-	(0.199)
Housing Starts (YoY) (MAY)	28-06-2019	05:00	JPY	-	(0.057)
PCE Core (MoM) (MAY)	28-06-2019	12:30	USD	-	0.002
PCE Core (YoY) (MAY)	28-06-2019	12:30	USD	-	0.016
PCE Deflator (MoM) (MAY)	28-06-2019	12:30	USD	-	0.002



PCE Deflator (YoY) (MAY)	28-06-2019	12:30	USD	-	0.015
Personal Income (MAY)	28-06-2019	12:30	USD	-	0.005
Personal Spending (MAY)	28-06-2019	12:30	USD	-	0.003
Real Personal Spending (MAY)	28-06-2019	12:30	USD	-	0
Chicago Purchasing Manager (JUN)	28-06-2019	13:45	USD	-	54.2
U. of Mich. 1 Yr Inflation (JUN F)	28-06-2019	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (JUN F)	28-06-2019	14:00	USD	-	0.022
U. of Mich. Current Conditions (JUN F)	28-06-2019	14:00	USD	-	112.5
U. of Mich. Expectations (JUN F)	28-06-2019	14:00	USD	-	88.6
U. of Mich. Sentiment (JUN F)	28-06-2019	14:00	USD	-	97.9
Baker Hughes U.S. Rig Count (JUN 28)	28-06-2019	17:00	USD	-	967
Fed's Daly Speaks at Aspen Ideas Festival	28-06-2019	19:20	USD	-	-

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