



28 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,748	0.5 %	15.0 %
BSE SENSEX	38,694	1.2 %	17.0 %
CNX BANK	28,358	0.3 %	16.6 %
CNX MIDCAP	19,826	0.3 %	3.8 %
CNX SMALLCAP	7,632	0.6 %	(3.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,050	1.0 %	4.9 %
S&P 500	2,897	0.8 %	7.5 %
FTSE 100	7,577	0.2 %	(0.9) %
HANG SENG	28,271	2.2 %	(7.4) %
NIKKEI	22,800	0.9 %	(3.0) %
SHANGHAI COMPOSITE	2,781	1.9 %	(16.9) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.16	0.1 %	10.2 %
EUR/USD	1.17	1.1 %	(2.8) %
GBP/USD	1.29	0.5 %	(4.7) %
USD/JPY	111.31	(0.1) %	(1.3) %
USD/AUD	1.36	(1.1) %	6.6 %
USD/SGD	1.36	(0.7) %	2.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	69	1.3 %	13.8 %
Gold(INR/10g)	29,869	1.0 %	1.7 %
Gold Comex(USD/oz)	1,212	1.6 %	(7.4) %
SILVER(INR/1Kg)	37,085	1.2 %	(3.9) %
Aluminium(USD/MT)	2,062	2.0 %	(8.6) %
Copper(USD/MT)	6,001	1.5 %	(16.4) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.8	(0.0) %	0.4 %

Global Economy: China's industrial profits logged a double-digit growth of 16.2% annually, but this was slower than the 20% increase registered in June, data from the National Bureau of Statistics showed Monday. During January to July period, industrial profits soared 17.1% from last year compared to 17.2% increase in January to June period. Germany's business confidence index rose more-than-expected to 103.8 in August from 101.7 in July, reports said citing survey data from Ifo Institute. The current conditions index climbed to 106.4. At the same time, the expectations index came in at 101.2.

Global Equities: Supportive Chinese economic data helped the markets on the first session of the week. Investor sentiment was also boosted by remarks by the Federal Reserve chairman at Jackson Hole.

Indian Economy: A sharp rise in non-oil imports are exerting pressure on India's trade imbalance, noted ASSOCHAM in a latest update. It is not only crude oil which is exerting pressure on India's import bill and consequently on the current account deficit and the rupee, but a host of other non-oil items like coal, electronics, chemicals and leather and leather products, fruits and vegetables are witnessing rising imports and becoming a drag on the country's overall balance of trade situation, an ASSOCHAM analysis has noted. While there is no alternative to crude oil and gold imports, domestic supply constraints have led to an increase in imports by well over the double digit in as many as 22 (other than crude and gold) out of 30 top import items, the chamber noted from the latest July data.

Equity Markets: Local stocks stayed well supported on upbeat global cues. The Sensex and the Nifty, both, attained record high levels in intraday as well as on closing basis. The Sensex gained 442.31 points or 1.16% to settle at 38,694.11, a record closing high. The Sensex rose 485.08 points, or 1.27% at the day's high of 38,736.88 in mid-afternoon trade.

Corporate News: Panacea Biotec has entered into a tripartite agreement with Natco Pharma ('Natco') and Breckenridge Pharmaceutical Inc. ('Breckenridge') for the manufacture and supply of Azacitidine Injection for the US market under Breckenridge's already-approved ANDA. Azacitidine is a generic equivalent of Vidaza, which is marketed by Celgene Corporation, US Hil announced that the company through its wholly owned subsidiary, HIL International GmbH, Germany has completed the acquisition of Parador Holdings GmbH, Germany after receiving all necessary regulatory approvals including anti-trust approvals from German Federal Republic. Eicher Trucks & Buses, a part of VE Commercial Vehicles (VECV), has bagged an order for 350 heavy duty trucks from Bangladesh Road Transport Corporation (BRTC). Escorts said it is setting up a joint venture (JV) with Japan's Tadano to manufacture rough terrain and truck mounted cranes in the country.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(7.8)	10.8	(23.9)
MF(INR cr)	19.3	122.9	369.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	32,998	35,864	33,500
F&O(INR cr)	783,115	950,718	883,725

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.0	12.5	14.4
NSE VIX	12.2	12.8	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,264	1.5 %	16.2 %	Energy	16,083	1.3 %	21.0 %
IT	15,515	1.7 %	22.1 %	Pharma	10,094	0.3 %	17.1 %
Metals	3,533	1.5 %	(0.2) %	Finance	11,741	1.3 %	14.4 %
Auto	10,994	0.8 %	(0.6) %	PSU	3,284	2.2 %	15.0 %
FMCG	32,604	0.7 %	23.0 %	Real Estate	274	0.1 %	(7.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Rural Elec	120	7.2 %	(6.7) %	LIC Housin	529	(7.7) %	(1.9) %
Piramal En	3,061	6.3 %	23.9 %	Emami	548	(2.1) %	0.4 %
Power Fin.	85	6.2 %	(2.5) %	Idea Cellu	51	(1.4) %	(33.9) %
Shriram Tr	1,358	4.2 %	(7.5) %	Sun Pharma	622	(1.3) %	22.4 %
NMDC	108	4.0 %	(8.7) %	Colgate-Pa	1,158	(1.0) %	9.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
ECB Board Member Peter Praet Speaks in Cologne, Germany	28-08-2018	11:00	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (JUL)	28-08-2018	8:00	EUR	-	0.044
BRC Shop Price Index (YoY) (AUG)	28-08-2018	23:01	GBP	-	(0.003)
Nationwide House Px (MoM) (AUG)	28-08-2018	6:00	GBP	-	0.006
Nationwide House Px n.s.a. (YoY) (AUG)	28-08-2018	6:00	GBP	-	0.025
Advance Goods Trade Balance (JUL)	28-08-2018	12:30	USD	-	-
Retail Inventories (MoM) (JUL)	28-08-2018	12:30	USD	-	0
Wholesale Inventories (MoM) (JUL P)	28-08-2018	12:30	USD	-	0.001
S&P CoreLogic CS 20-City (MoM) SA (JUN)	28-08-2018	13:00	USD	-	0.002
S&P/Case-Shiller 20-City Index n.s.a (JUN)	28-08-2018	13:00	USD	-	211.94
S&P/Case-Shiller Composite-20 (YoY) (JUN)	28-08-2018	13:00	USD	-	0.0651
S&P/Case-Shiller US Home Price Index (JUN)	28-08-2018	13:00	USD	-	202.95
S&P/Case-Shiller US Home Price Index (YoY) (JUN)	28-08-2018	13:00	USD	-	0.0638
Conf. Board Expectations (AUG)	28-08-2018	14:00	USD	-	101.7
Conf. Board Present Situation (AUG)	28-08-2018	14:00	USD	-	165.9
Consumer Confidence Index (AUG)	28-08-2018	14:00	USD	-	127.4
Richmond Fed Manufact. Index (AUG)	28-08-2018	14:00	USD	-	20
U.S. to Sell 4-Week Bills (AUG 28)	28-08-2018	15:30	USD	-	-
U.S. to Sell 5-Year Notes (AUG 28)	28-08-2018	17:00	USD	-	-

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