



28 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,114	0.1 %	(4.8) %
BSE SENSEX	37,641	0.4 %	(3.1) %
CNX BANK	28,031	(0.3) %	(7.6) %
CNX MIDCAP	15,771	0.4 %	(14.0) %
CNX SMALLCAP	5,493	0.5 %	(18.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,778	(0.5) %	10.5 %
S&P 500	2,869	(0.3) %	14.5 %
FTSE 100	7,090	(0.1) %	5.3 %
HANG SENG	25,664	(0.1) %	2.1 %
NIKKEI	20,456	1.0 %	4.6 %
SHANGHAI COMPOSITE	2,902	1.4 %	17.7 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.57	(0.2) %	3.1 %
EUR/USD	1.11	0.1 %	(3.1) %
GBP/USD	1.23	0.6 %	(3.8) %
USD/JPY	105.79	(0.6) %	(3.5) %
USD/AUD	1.48	0.1 %	4.1 %
USD/SGD	1.39	0.2 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	3.1 %	19.2 %
Gold(INR/10g)	38,404	(0.5) %	21.8 %
Gold Comex(USD/oz)	1,542	1.0 %	19.5 %
SILVER(INR/1Kg)	45,245	0.4 %	18.2 %
Aluminium(USD/MT)	1,744	(0.1) %	(6.1) %
Copper(USD/MT)	5,662	(0.2) %	(3.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	(0.1) %	(1.2) %

Global Economy: The Conference Board said its consumer confidence index edged down to 135.1 in August after surging up to 135.8 in July. China's industrial profits recovered in July despite escalating trade disputes, data from the National Bureau of Statistics showed Tuesday. China industrial profits increased 2.6% year-on-year in July after a 3.1% fall in June. Germany's economy contracted as initially estimated in the second quarter due to weak foreign demand, and there are signs that the shrinking continued into the third quarter. Gross domestic product in Germany shrank by 0.1% quarter-on-quarter in the three months to June. French consumer sentiment index held steady at 102 in August. Japan Producer prices were up 0.1% on month in July following the 0.1 percent decline in June. On a yearly basis, producer prices gained 0.5%. Consumer confidence in South Korea tanked in August, the latest survey from the Bank of Korea showed on Tuesday, as its index came in with a score of 92.5 - down sharply from 95.9 in July.

Global Equities: Sentiments improved on signs that the US and China might be calling a truce on the trade war in near term. European stocks were mixed as coalition talks continued in Italy.

Indian Economy: Central Board of the Reserve Bank of India (RBI) decided to transfer a sum of Rs 1,76,051 crore to the Government of India (Government) comprising of Rs 1,23,414 crore of surplus for the year 2018-19 and Rs 52,637 crore of excess provisions identified as per the revised Economic Capital Framework (ECF). Union Minister of Consumer Affairs, Food and Public Distribution, Ram Vilas Paswan stated that there is ample availability of all pulses, oilseeds and onions in the country. Around of 307 lakh tonnes of pulses will be available with the government in the current year, of which 290 lakh tonnes is estimated to be consumed says Ministry of Consumer Affairs.

Equity Markets: Benchmark indices gained for third day in a row. Markets were supported by easing fiscal deficit worries after RBI decided to transfer Rs 1.76 lakh crore to government. Nifty50 closed above 11,100 for first time in two weeks. Easing global trade war worries and expectations of more stimulus measures by the government boosted sentiment.

Corporate News: Power Grid Corporation of India's board of directors has accorded investment approval for Transmission System for Solar Energy Zones in Rajasthan at an estimated cost of Rs 2578.47 crore with commissioning schedule as December, 2020. Vedanta Ltd has collaborated with government think-tank NITI Aayog to help improve the quality of life of the people of Kalahandi district of Odisha. IT stocks could extend their yesterday's slide following a reversal in Indian Rupee from nearly eight month low. Metal counters can see some buying as global Copper prices edged up impressively yesterday. COMEX Copper rebounded from 27 month low.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(97.9)	(116.7)	7.0
MF(INR cr)	1,628.3	1,025.8	380.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	49,170	36,522	34,481
F&O(INR cr)	1,257,676	1,487,081	1,277,455

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.3	18.8	15.4
NSE VIX	16.0	16.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,126	0.6 %	(7.3) %	Energy	14,605	1.4 %	(11.7) %
IT	15,675	(1.4) %	(1.0) %	Pharma	7,812	(0.2) %	(16.7) %
Metals	2,304	2.1 %	(25.7) %	Finance	12,646	0.7 %	1.2 %
Auto	7,153	1.9 %	(15.0) %	PSU	2,551	2.5 %	(24.6) %
FMCG	28,927	0.8 %	(4.2) %	Real Estate	257	1.1 %	(4.0) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Tata Motor	120	8.9 %	(35.8) %	Vodafone I	5	(3.6) %	(70.1) %
HDFC AMC	2,412	7.5 %	55.0 %	Bharti Air	348	(3.4) %	11.3 %
Tata Motor	56	7.0 %	(39.5) %	Indiabulls	472	(3.3) %	(44.3) %
Britannia	2,686	6.0 %	(11.9) %	Infosys	785	(2.2) %	3.9 %
Ashok Leyl	67	5.5 %	(26.2) %	Tech Mahin	676	(2.1) %	(13.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Construction Work Done (2Q)	28-08-2019	01:30	AUD	-	-
Credit Suisse Survey Expectations (AUG)	28-08-2019	08:00	CHF	-	-
German GfK Consumer Confidence (SEP)	28-08-2019	06:00	EUR	-	-
German Import Price Index (MoM) (JUL)	28-08-2019	06:00	EUR	-	-
German Import Price Index (YoY) (JUL)	28-08-2019	06:00	EUR	-	-
Euro-Zone M3 Money Supply (YoY) (JUL)	28-08-2019	08:00	EUR	-	-
Foreign Buying Japan Bonds (AUG 23)	28-08-2019	23:50	JPY	-	(□52.1b)
Foreign Buying Japan Stocks (AUG 23)	28-08-2019	23:50	JPY	-	(□359.6b)
Japan Buying Foreign Bonds (Yen) (AUG 23)	28-08-2019	23:50	JPY	-	□499.7b
Japan Buying Foreign Stocks (Yen) (AUG 23)	28-08-2019	23:50	JPY	-	(□105.6b)
Loans & Discounts Corp (YoY) (JUL)	28-08-2019	23:50	JPY	-	-
MBA Mortgage Applications (AUG 23)	28-08-2019	11:00	USD	-	-
DOE Cushing OK Crude Inventory (AUG 23)	28-08-2019	14:30	USD	-	(2485k)
DOE U.S. Crude Oil Inventories (AUG 23)	28-08-2019	14:30	USD	-	(2732k)
DOE U.S. Distillate Inventory (AUG 23)	28-08-2019	14:30	USD	-	2610k
DOE U.S. Gasoline Inventories (AUG 23)	28-08-2019	14:30	USD	-	312k
U.S. to Sell USD18 Bln 2-Year FRNs Reopening	28-08-2019	15:30	USD	-	-
Fed's Barkin Speraks to West Virginia Chamber of Commerce	28-08-2019	16:20	USD	-	-
U.S. to Sell USD41 Bln 5-Year Notes	28-08-2019	17:00	USD	-	-
Fed's Daly Speaks at RBNZ/IMF Conference in New Zealand	28-08-2019	21:30	USD	-	-

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