



28 Sep.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,978	0.0 %	7.5 %
BSE SENSEX	36,324	(0.6) %	9.6 %
CNX BANK	25,042	0.0 %	2.9 %
CNX MIDCAP	17,510	0.0 %	(8.3) %
CNX SMALLCAP	6,481	0.0 %	(18.3) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,440	0.2 %	6.5 %
S&P 500	2,914	0.3 %	8.1 %
FTSE 100	7,545	0.5 %	(1.3) %
HANG SENG	27,716	(0.4) %	(9.2) %
NIKKEI	23,797	(1.0) %	1.2 %
SHANGHAI COMPOSITE	2,792	(0.5) %	(16.6) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	72.60	(0.1) %	14.0 %
EUR/USD	1.16	(1.0) %	(3.0) %
GBP/USD	1.31	(0.7) %	(3.2) %
USD/JPY	113.57	0.6 %	0.8 %
USD/AUD	1.39	0.9 %	8.4 %
USD/SGD	1.37	0.2 %	2.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	72	(1.0) %	18.6 %
Gold(INR/10g)	30,575	(0.3) %	4.1 %
Gold Comex(USD/oz)	1,202	(0.3) %	(8.1) %
SILVER(INR/1Kg)	37,300	(0.5) %	(3.4) %
Aluminium(USD/MT)	2,057	1.8 %	(8.8) %
Copper(USD/MT)	6,258	(0.3) %	(12.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.0) %	0.6 %

**Global Economy:** A report released by the Commerce Department on Thursday showed the pace of U.S. economic growth in the second quarter was unrevised from the previous estimate. The report said gross domestic product increased at an annual rate of 4.2% in the second quarter, unchanged from the estimate released last month. The GDP growth in the second quarter is a substantial acceleration from the 2.2% rise in the first quarter and marks the strongest growth since a 4.9% jump in the third quarter of 2014. China's industrial profits increased at a slower pace in August, the National Bureau of Statistics reported Thursday. Industrial profits climbed 9.2% year-on-year in August, which was much weaker than the 16.2% increase seen in July. During the first eight months of year, industrial profits rose 16.2% compared to 17.1% growth logged during January to July period. Eurozone economic confidence dropped to 110.9 in September from 111.6 in August, survey data from European Commission showed Thursday. The score was forecast to fall to 111.2. The decrease in sentiment resulted from lower confidence levels in the industry sector and among consumers, which were only partly offset by increases in the retail trade and construction sectors. The industrial confidence index slid to 4.7 from 5.6 in August. German consumer confidence is set to improve in October despite political turbulence, survey data from market research group GfK showed. The forward-looking consumer sentiment index rose 0.1 points to 10.6 in September.

**Global Equities:** Action remained mixed across the globe following the recent interest rate hike by the US Fed. A firm undertone in crude oil prices weighed on emerging markets. US President Donald Trump reportedly accused China of intending to interfere with the upcoming US congressional elections this November.

**Indian Economy:** The water storage available in 91 major reservoirs of the country for the week ending on September 27, 2018 was 122.514 BCM which is 76% of total storage capacity of these reservoirs. This percentage was at 74% for the week ending on September 20, 2018. The level of water storage in the week ending on September 27, 2018 was 117% of the storage of corresponding period of last year and 105% of storage of average of last ten years. Domestic bank credit rose by 13.46% to Rs 87,98,812 crore in the fortnight ended September 14, according to the recent RBI data.

**Equity Markets:** Local stocks stayed slippery. Key equity indices declined for the second consecutive session ahead of the futures and options (F&O) expiry and mixed global cues after US Federal Reserve's rate hike. Investors also turned cautious after the government raised import tariffs on select goods and the central bank announced measures to ease liquidity concerns. The broader NSE Nifty finished below the 11,000 mark.

**Corporate News:** Tata Communications has unveiled a new, state-of-the-art Cyber Security Response Centre (CSRC) in Chennai. The Chennai CSRC follows the recent unveiling of Tata Communications' Cyber Security Response Centre in Dubai, and the existing centres in Pune and Singapore. Local metal and mining counters could be in focus following the latest tumble in Copper prices. Indian Oil Corporation (IOCL) has signs a memorandum of understanding (MoU) with Haryana government for setting up bio-CNG plants based on paddy straw and other agri-waste in the state. The first such compressed biogas plant (CBP) is likely to be set up in Kurukshetra.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(96.2)	(72.8)	(33.0)
MF(INR cr)	1,544.1	512.3	383.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	44,956	41,296	34,822
F&O(INR cr)	1,894,899	1,359,440	957,215

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.4	13.0	14.1
NSE VIX	16.9	14.9	13.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,042	(1.3) %	2.9 %	Energy	15,695	(0.1) %	18.1 %
IT	16,018	0.5 %	26.1 %	Pharma	10,092	(1.9) %	17.1 %
Metals	3,670	(0.7) %	3.7 %	Finance	10,525	(1.7) %	2.6 %
Auto	9,815	(1.9) %	(11.2) %	PSU	2,724	(0.9) %	(4.6) %
FMCG	29,660	(0.1) %	11.9 %	Real Estate	231	(2.8) %	(22.2) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
New India	228	4.0 %	(35.2) %	Yes Bank	203	(9.2) %	(33.6) %
Bandhan Ba	570	3.2 %	19.9 %	Vodafone I	39	(7.1) %	(50.5) %
Bharti Inf	268	2.4 %	(20.7) %	Piramal En	2,366	(6.7) %	(4.3) %
TCS	2,189	2.2 %	50.5 %	Indiabulls	940	(6.0) %	(24.5) %
Godrej Con	783	1.4 %	5.4 %	DLF	172	(5.9) %	(14.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (AUG)	28-09-2018	01:30	AUD	-	0.004
Private Sector Credit (YoY) (AUG)	28-09-2018	01:30	AUD	-	0.044
Gross Domestic Product (MoM) (JUL)	28-09-2018	12:30	CAD	-	0
Gross Domestic Product (YoY) (JUL)	28-09-2018	12:30	CAD	-	0.024
Industrial Product Price (MoM) (AUG)	28-09-2018	12:30	CAD	-	(0.002)
Raw Materials Price Index (MoM) (AUG)	28-09-2018	12:30	CAD	-	0.007
KOF Leading Indicator (SEP)	28-09-2018	07:00	CHF	-	100.3
Caixin China PMI Mfg (SEP)	28-09-2018	01:45	CNY	-	50.6
German Unemployment Change (000's) (SEP)	28-09-2018	07:55	EUR	-	-
German Unemployment Claims Rate s.a. (SEP)	28-09-2018	07:55	EUR	-	0.052
Euro-Zone Consumer Price Index Core (YoY) (SEP A)	28-09-2018	09:00	EUR	-	0.01
Euro-Zone Consumer Price Index Estimate (YoY) (SEP)	28-09-2018	09:00	EUR	-	0.02
ECB's Praet Speaks in Frankfurt	28-09-2018	12:35	EUR	-	-
Current Account Balance (2Q)	28-09-2018	08:30	GBP	-	-
Gross Domestic Product (QoQ) (2Q F)	28-09-2018	08:30	GBP	-	0.004
Gross Domestic Product (YoY) (2Q F)	28-09-2018	08:30	GBP	-	0.013
Total Business Investment (QoQ) (2Q F)	28-09-2018	08:30	GBP	-	0.005
Total Business Investment (YoY) (2Q F)	28-09-2018	08:30	GBP	-	0.008
BOE's Ramsden speaks in London	28-09-2018	13:20	GBP	-	-
Vehicle Production (YoY) (JUL)	28-09-2018	04:00	JPY	-	(0.044)
Annualized Housing Starts (AUG)	28-09-2018	05:00	JPY	-	-
Construction Orders (YoY) (AUG)	28-09-2018	05:00	JPY	-	(0.093)
Housing Starts (YoY) (AUG)	28-09-2018	05:00	JPY	-	(0.007)
Fed's Barkin Speaks at Forum for Minorities in Banking	28-09-2018	12:30	USD	-	-
Personal Consumption Expenditure Core (MoM) (AUG)	28-09-2018	12:30	USD	-	0.002
Personal Consumption Expenditure Core (YoY) (AUG)	28-09-2018	12:30	USD	-	0.02
Personal Consumption Expenditure Deflator (MoM) (AUG)	28-09-2018	12:30	USD	-	0.001
Personal Consumption Expenditure Deflator (YoY) (AUG)	28-09-2018	12:30	USD	-	0.023
Personal Income (AUG)	28-09-2018	12:30	USD	-	0.002



Personal Spending (AUG)	28-09-2018	12:30	USD	-	0.004
Real Personal Spending (AUG)	28-09-2018	12:30	USD	-	0.002
Chicago Purchasing Manager (SEP)	28-09-2018	13:45	USD	-	63.6
U. of Mich. 1 Yr Inflation (SEP F)	28-09-2018	14:00	USD	-	0.028
U. of Mich. 5-10 Yr Inflation (SEP F)	28-09-2018	14:00	USD	-	0.024
U. of Mich. Current Conditions (SEP F)	28-09-2018	14:00	USD	-	116.1
U. of Mich. Expectations (SEP F)	28-09-2018	14:00	USD	-	91.1
U. of Mich. Sentiment (SEP F)	28-09-2018	14:00	USD	-	100.8
Baker Hughes U.S. Rig Count (SEP 28)	28-09-2018	17:00	USD	-	-
Fed's Williams Speaks in New York at Money Markets Conference	28-09-2018	20:45	USD	-	-

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