



29 Jun.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,589	0.0 %	3.7 %
BSE SENSEX	35,038	(0.5) %	5.4 %
CNX BANK	26,325	0.0 %	8.2 %
CNX MIDCAP	17,845	0.0 %	(6.6) %
CNX SMALLCAP	7,012	0.0 %	(11.6) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,216	0.4 %	(2.4) %
S&P 500	2,716	0.6 %	0.8 %
FTSE 100	7,616	(0.1) %	(0.4) %
HANG SENG	28,497	0.5 %	(6.6) %
NIKKEI	22,270	(0.0) %	(5.3) %
SHANGHAI COMPOSITE	2,787	(0.9) %	(16.8) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.79	0.8 %	8.0 %
EUR/USD	1.16	(0.7) %	(3.7) %
GBP/USD	1.31	(1.1) %	(3.3) %
USD/JPY	110.46	0.6 %	(2.0) %
USD/AUD	1.36	0.4 %	6.5 %
USD/SGD	1.37	0.3 %	2.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	73	3.2 %	20.5 %
Gold(INR/10g)	30,488	(0.2) %	3.8 %
Gold Comex(USD/oz)	1,254	(0.3) %	(4.2) %
SILVER(INR/1Kg)	39,425	(0.3) %	2.1 %
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: Eurozone economic sentiment index fell to 112.3 in June from 112.5 in May, data from the European Commission showed Thursday. The industrial confidence index held steady at 6.9. At the same time, the indicator for retail trade rose slightly to 0.8 from 0.7 in the previous month. Meanwhile, the consumer sentiment index slid to -0.5 in June from +0.2 a month ago. The score matched flash estimate. German forward-looking consumer sentiment index held steady at 10.7 points in July, survey data from market research group GfK showed Thursday. This was slightly above the expected level of 10.6. The route taken by the US President in terms of the trade policy towards the EU is causing concern, GfK said. In contrast, the income expectations and propensity to buy improved in June.

Global Equities: The momentum remained weary as uncertainty over US President Donald Trump's trade policies on China lingered.

Indian Economy: Southwest monsoon has further advanced into some more parts of Gujarat region, most parts of East Rajasthan, some parts of West Rajasthan, entire Haryana, Chandigarh & Delhi, remaining parts of West Uttar Pradesh, Uttarakhand, Himachal Pradesh & Punjab, according to a latest update from the Ministry of Earth Science. Conditions are favourable for further advance of Southwest Monsoon into remaining parts of north Arabian Sea, Gujarat, Rajasthan and thus the entire country during next 2-3 days. Wide spread rainfall activity observed over northwest India with heavy rainfall at isolated places, says the update.

Equity Markets: Local stocks extended losses amid weak global cues. Trading was volatile as traders rolled over positions in the F&O segment from the near month June 2018 series to July 2018 series. The Sensex regained the psychological 35,000 mark in volatile trade. However, overall sentiments remained negative as mid caps tumbled nearly 2% and by index heavyweights like ICICI Bank, Reliance Industries and HDFC also witnessed deep losses. Weak INR also kept the mood sluggish. The INR fell to an all time low above 69 per US dollar.

Corporate News: Tata Consultancy Services has been ranked number one in the IT Services & Software sector in the 2018 All-Asia Executive Team survey published by Institutional Investors. Larsen & Toubro has entered into a Share Purchase Agreement on 27 June 2018 between Marine Infrastructure Developers, L&T Shipbuilding and Adani Kattupalli Port and Adani Ports & Special Economic Zone for the divestment of its entire 97% stake in Marine Infrastructure Developers, a subsidiary, to Adani Ports and Special Economic Zone. Manpasand Beverages has entered into a ten year agreement with Parle Products for joint distribution of their products, pan-India. As a part of this association, both the companies will jointly distribute their products across 4.5 million outlets and aim to achieve a significant market share in their respective categories. Metals and mining counters could stay under continued pressure as global copper futures are struggling around three month lows.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	8.6	(28.0)	(47.5)
MF(INR cr)	616.3	386.5	492.5

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	40,526	29,724	33,048
F&O(INR cr)	1,955,856	908,757	843,452

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.9	13.4	15.2
NSE VIX	14.0	12.8	13.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	26,325	(0.4) %	8.2 %	Energy	12,999	(1.9) %	(2.2) %
IT	13,874	(1.0) %	9.2 %	Pharma	9,149	(1.2) %	6.1 %
Metals	3,347	0.1 %	(5.5) %	Finance	10,949	(0.9) %	6.7 %
Auto	10,633	(0.8) %	(3.9) %	PSU	2,754	(1.9) %	(3.5) %
FMCG	28,412	(0.7) %	7.2 %	Real Estate	265	(2.2) %	(10.6) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Oracle Fin	4,158	2.6 %	5.6 %	Tech Mahin	664	(7.0) %	3.7 %
Idea Cellu	57	1.8 %	(27.1) %	NHPC Ltd	23	(6.8) %	(19.3) %
M & M	908	1.7 %	21.3 %	H P C L	261	(5.5) %	(24.1) %
NTPC	156	1.7 %	(8.2) %	Shriram Tr	1,304	(5.2) %	(11.2) %
Motherson	282	1.6 %	(13.0) %	Punjab Nat	73	(5.1) %	(24.4) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (MAY)	29-06-2018	01:30	AUD	-	0.004
Private Sector Credit (YoY) (MAY)	29-06-2018	01:30	AUD	-	0.051
Gross Domestic Product (MoM) (APR)	29-06-2018	12:30	CAD	-	0.003
Gross Domestic Product (YoY) (APR)	29-06-2018	12:30	CAD	-	0.029
Industrial Product Price (MoM) (MAY)	29-06-2018	12:30	CAD	-	0.005
Raw Materials Price Index (MoM) (MAY)	29-06-2018	12:30	CAD	-	0.007
Bank of Canada Senior Loan Officer Survey (2Q)	29-06-2018	14:30	CAD	-	(5.2)
BoC Overall Business Outlook Survey (2Q)	29-06-2018	14:30	CAD	-	2
Business Outlook Future Sales (2Q)	29-06-2018	14:30	CAD	-	16
KOF Leading Indicator (JUN)	29-06-2018	07:00	CHF	-	100
German Import Price Index (MoM) (MAY)	29-06-2018	06:00	EUR	-	0.006
German Import Price Index (YoY) (MAY)	29-06-2018	06:00	EUR	-	0.006
German Retail Sales (MoM) (MAY)	29-06-2018	06:00	EUR	-	0.023
German Retail Sales (YoY) (MAY)	29-06-2018	06:00	EUR	-	0.012
German Unemployment Change (000's) (JUN)	29-06-2018	07:55	EUR	-	-
German Unemployment Claims Rate s.a. (JUN)	29-06-2018	07:55	EUR	-	0.052
Euro-Zone Consumer Price Index Core (YoY) (JUN A)	29-06-2018	09:00	EUR	-	0.011
Euro-Zone Consumer Price Index Estimate (YoY) (JUN)	29-06-2018	09:00	EUR	-	0.019
Current Account Balance (1Q)	29-06-2018	08:30	GBP	-	-
Gross Domestic Product (QoQ) (1Q F)	29-06-2018	08:30	GBP	-	0.001
Gross Domestic Product (YoY) (1Q F)	29-06-2018	08:30	GBP	-	0.012
Index of Services (3Mo3M) (APR)	29-06-2018	08:30	GBP	-	0.003
Index of Services (MoM) (APR)	29-06-2018	08:30	GBP	-	0.001
M4 Ex IOFCs 3M Annualised (MAY)	29-06-2018	08:30	GBP	-	(0.007)
M4 Money Supply (YoY) (MAY)	29-06-2018	08:30	GBP	-	0.011
Money Supply M4 (MoM) (MAY)	29-06-2018	08:30	GBP	-	0.002
Mortgage Approvals (MAY)	29-06-2018	08:30	GBP	-	-
Net Consumer Credit (MAY)	29-06-2018	08:30	GBP	-	-
Net Lending to the Private Sector (MAY)	29-06-2018	08:30	GBP	-	-



Total Business Investment (QoQ) (1Q F)	29-06-2018	08:30	GBP	-	(0.002)
Total Business Investment (YoY) (1Q F)	29-06-2018	08:30	GBP	-	0.02
BOJ Outright Bond Purchase 1~3 Years	29-06-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	29-06-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	29-06-2018	01:10	JPY	-	-
Vehicle Production (YoY) (APR)	29-06-2018	04:17	JPY	-	0.002
Annualized Housing Starts (MAY)	29-06-2018	05:00	JPY	-	-
Construction Orders (YoY) (MAY)	29-06-2018	05:00	JPY	-	0.04
Consumer Confidence Index (JUN)	29-06-2018	05:00	JPY	-	43.8
Housing Starts (YoY) (MAY)	29-06-2018	05:00	JPY	-	0.003
PCE Core (MoM) (MAY)	29-06-2018	12:30	USD	-	0.002
PCE Core (YoY) (MAY)	29-06-2018	12:30	USD	-	0.018
PCE Deflator (MoM) (MAY)	29-06-2018	12:30	USD	-	0.002
PCE Deflator (YoY) (MAY)	29-06-2018	12:30	USD	-	0.02
Personal Income (MAY)	29-06-2018	12:30	USD	-	0.003
Personal Spending (MAY)	29-06-2018	12:30	USD	-	0.006
Real Personal Spending (MAY)	29-06-2018	12:30	USD	-	0.004
Chicago Purchasing Manager (JUN)	29-06-2018	13:45	USD	-	62.7
U. of Mich. 1 Yr Inflation (JUN F)	29-06-2018	14:00	USD	-	0.029
U. of Mich. 5-10 Yr Inflation (JUN F)	29-06-2018	14:00	USD	-	0.026
U. of Mich. Current Conditions (JUN F)	29-06-2018	14:00	USD	-	117.9
U. of Mich. Expectations (JUN F)	29-06-2018	14:00	USD	-	87.4
U. of Mich. Sentiment (JUN F)	29-06-2018	14:00	USD	-	99.3
Baker Hughes U.S. Rig Count (JUN 29)	29-06-2018	17:00	USD	-	1052

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