



29 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,284	0.3 %	(3.3) %
BSE SENSEX	37,883	0.1 %	(2.5) %
CNX BANK	29,325	1.0 %	(3.3) %
CNX MIDCAP	16,165	0.6 %	(11.8) %
CNX SMALLCAP	5,708	(0.0) %	(15.3) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,192	0.2 %	16.6 %
S&P 500	3,026	0.7 %	20.7 %
FTSE 100	7,549	0.8 %	12.1 %
HANG SENG	28,398	(0.7) %	13.0 %
NIKKEI	21,658	(0.5) %	10.7 %
SHANGHAI COMPOSITE	2,945	0.2 %	19.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.87	0.0 %	(0.8) %
EUR/USD	1.11	(0.0) %	(2.7) %
GBP/USD	1.25	0.0 %	(2.1) %
USD/JPY	108.35	0.2 %	(1.2) %
USD/AUD	1.44	0.3 %	1.1 %
USD/SGD	1.37	0.1 %	0.1 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	(0.1) %	20.7 %
Gold(INR/10g)	34,781	(0.5) %	10.3 %
Gold Comex(USD/oz)	1,419	0.1 %	9.9 %
SILVER(INR/1Kg)	40,811	(0.6) %	6.7 %
Aluminium(USD/MT)	1,778	(1.0) %	(4.3) %
Copper(USD/MT)	5,945	(1.1) %	1.8 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.1	0.0 %	(0.6) %

Global Economy: US economic growth slowed in the second quarter of this year, according to a report released by the Commerce Department on Friday. The Commerce Department said real gross domestic product rose by 2.1% in the second quarter following the 3.1% jump in the first quarter. Eurozone inflation expectations continued to weaken into the third quarter amid lingering high level of uncertainties and downside risks, the results of a key survey by the European Central Bank showed on Friday. The inflation expectations for 2019, 2020 and 2021 were revised down by 0.1 percentage points each to 1.3%, 1.4% and 1.5%, respectively. Russia's central bank slashed its key interest rate for a second policy session in a row, in line with its earlier guidance, and signaled more easing in future as growth remains below expectations. The bank decided to cut the key rate by 25 basis points to 7.25%.

Global Equities: The US stocks edged up on Friday with the Nasdaq and the S&P 500 hitting new record closing highs.

Indian Economy: The kharif acreage showed a 6.44% shortfall in sowing. The total acreage stand at 689 lakh hectares (lh), official data showed. The Goods & Service Tax Council decided to trim the duty on all electric vehicles (EVs) and the charger for such vehicles. According to a statement by the Finance Ministry, the GST rate on EVs will be reduced to 5% from 12%. As of now, petrol and diesel based automobiles attract GST at the rate of 28%. A total of 38,964 storage infrastructure projects (Godowns), with storage capacity of 655.48 Lakh MT have been sanctioned across the country under Agricultural Marketing Infrastructure (AMI) scheme.

Equity Markets: The local market ended with small gains, snapping a six-day losing streak in last session. The recovery was backed by firmness in auto, bank and metal stocks. The Nifty struggled to cross 11,300 mark and ended below that level. The Sensex rose 51.81 points or 0.14% to settle at 37,882.79. The Nifty 50 index rose 32.15 points or 0.29% to settle at 11,284.30.

Corporate News: ICICI Bank reported a net profit of Rs. 1,908.03 crore for the quarter ended June 30. The private sector lender had reported a net loss of Rs. 119.55 crore for the corresponding three-month period a year ago. The net income stood at Rs. 21,405.50 crore in the first quarter of the current financial year, marking an increase of 15.24% on a year-on-year basis. The gross non-performing assets as a percentage of total advances came in at 6.49% as against 6.70% in the previous quarter. Net non-performing assets (NPA) improved to 1.77% in the June quarter, from 2.06% in the quarter ended March 31. V-Guard Industries announced that ICRA has re-affirmed the long term credit rating for Rs. 344.87 crore line of credit of the Company at "[ICRA] AA" (pronounced ICRA double A). The outlook on the long term rating remain "Stable". NHPC announced that the Resolution Plan submitted by NHPC for Lanco Teesta Hydro Power Limited has been approved by NCLT Bench, Hyderabad subject to certain reliefs as per The Insolvency and Bankruptcy Code, 2016 (IBC). Maruti Suzuki India announced the introduction of CNG variant in Ertiga and Tour M. The ex-showroom price in Delhi and NCR of Ertiga CNG is Rs. 8,87,689/- while the price of Tour M CNG is Rs. 8,82,689/-. Cadila Healthcare announced that the USFDA inspected the Company's API manufacturing facility located at Ankleshwar from 22 to 26 July, 2019. This audit covered both Unit I and II. At the end of the inspection, no observation (483) is issued.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	77.6	(105.5)	31.5
MF(INR cr)	(1,290.5)	383.9	178.4

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	34,662	32,543	33,963
F&O(INR cr)	707,106	1,237,740	1,233,505

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	12.2	13.1	14.7
NSE VIX	12.1	12.9	18.1

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	29,325	1.0 %	(3.3) %	Energy	14,921	(0.9) %	(9.7) %
IT	15,348	(0.8) %	(3.1) %	Pharma	8,179	1.0 %	(12.8) %
Metals	2,692	0.2 %	(13.2) %	Finance	12,880	0.6 %	3.0 %
Auto	7,162	2.2 %	(14.9) %	PSU	2,863	1.1 %	(15.4) %
FMCG	29,142	0.5 %	(3.5) %	Real Estate	274	0.2 %	2.7 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Yes Bank	96	9.6 %	(65.2) %	Vodafone I	9	(4.6) %	(47.9) %
Bajaj Fin.	3,265	7.2 %	8.8 %	Vedanta	164	(4.3) %	(13.1) %
Bajaj Fins	7,233	6.6 %	1.0 %	IOCL	142	(3.3) %	(10.6) %
Bandhan Ba	490	6.2 %	(7.5) %	Page Indus	18,495	(2.9) %	(27.6) %
HDFC AMC	2,195	5.0 %	41.1 %	Container	519	(1.7) %	(2.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

..... End of Report