



29 Aug.2018

INDEX PERFORMANCE

| INDIAN INDICES | LATEST | % 1D | % YTD |
|--------------------|--------|---------|----------|
| CNX NIFTY | 11,739 | 0.4 % | 15.0 % |
| BSE SENSEX | 38,897 | 0.5 % | 17.0 % |
| CNX BANK | 28,270 | 0.0 % | 16.2 % |
| CNX MIDCAP | 19,718 | (0.3) % | 3.3 % |
| CNX SMALLCAP | 7,598 | 0.1 % | (4.2) % |
| GLOBAL INDICES | LATEST | % 1D | % YTD |
| DOW JONES | 26,064 | 0.1 % | 5.0 % |
| S&P 500 | 2,898 | 0.0 % | 7.5 % |
| FTSE 100 | 7,617 | 0.5 % | (0.4) % |
| HANG SENG | 28,352 | 0.3 % | (7.1) % |
| NIKKEI | 22,813 | 0.1 % | (2.9) % |
| SHANGHAI COMPOSITE | 2,778 | (0.1) % | (17.0) % |

FOREX RATES

| | LATEST | % 1D | % YTD |
|---------|--------|---------|---------|
| USD/INR | 70.11 | 0.3 % | 10.1 % |
| EUR/USD | 1.17 | 0.6 % | (2.6) % |
| GBP/USD | 1.29 | 0.1 % | (4.8) % |
| USD/JPY | 111.30 | 0.1 % | (1.3) % |
| USD/AUD | 1.36 | (0.2) % | 6.4 % |
| USD/SGD | 1.36 | (0.1) % | 2.2 % |

COMMODITIES

| | LATEST | % 1D | % YTD |
|--------------------|--------|-------|----------|
| WTI Crude(USD/bbl) | 69 | 0.2 % | 14.1 % |
| Gold(INR/10g) | 30,097 | 0.8 % | 2.5 % |
| Gold Comex(USD/oz) | 1,215 | 0.2 % | (7.2) % |
| SILVER(INR/1Kg) | 37,475 | 1.1 % | (2.9) % |
| 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 | 2.9 | 0.1 % | 0.4 % |

Global Economy: A report released by the Conference Board on Tuesday showed an unexpected improvement in US consumer confidence. The Conference Board said its consumer confidence index surged up to 133.4 in August from an upwardly revised 127.9 in July. China should strengthen its fiscal and financial measures to encourage investment, the National Development and Reform Commission said. Investment in intended projects grew at a slower pace of 3.1% during January to July period. According to NDRC monitoring report, investment value of infrastructure projects plunged 35.2%, while it grew 12.4% in manufacturing during January to July period. Strong cost pressures hit the UK service sector profitability in three months to August, the Services Sector Survey from the Confederation of British Industry showed Tuesday. Profitability in business and professional services sector and the consumer services sector failed to improve. The balance came in at 1% in business & professional services, while it fell to -18% in consumer services. The growth in business volume in business and professional services eased, with the balance falling to 14% from 25% in May.

Global Equities: Sentiment was boosted after the United States and Mexico agreed to overhaul the North American Free Trade Agreement. Metals were well supported.

Indian Economy: Union Minister of Commerce & Industry and Civil Aviation chaired a meeting of different exports stakeholders and Commerce Ministry officers to discuss a strategy for revitalizing India's exports and doubling the country's exports by 2025. The Minister said that this is necessary in view of challenges like uncertainty of global trade, rigid approach of banks affecting availability of credit, high logistics cost and productivity standards and qualities. Exports create jobs, bring in foreign exchange and validate India's international competitiveness. Minister of State, C R Chaudhary will be the chairperson of this mission and will regularly review the work of different export promotion councils and divisions of the Ministry of Commerce.

Equity Markets: Key benchmark indices logged modest gains yesterday as supportive global cues helped the mood. The upside was led by index heavyweights Reliance Industries and HDFC. The barometer index, the S&P BSE Sensex, gained 202.52 points or 0.52% to settle at 38,896.63. The Nifty 50 index rose 46.55 points or 0.4% to settle at 11,738.50. Indices opened higher and hit fresh intraday high in early trade. Indices pared gains in morning trade. Indices firmed up once again and hovered near the day's high since afternoon trade.

Corporate News: Maruti Suzuki's skill development initiative, the Japan India Institute for Manufacturing (JIM) in Mehsana, Gujarat - was recognized with CSR Times award 2018. JIM, set up and managed by Maruti Suzuki, has recorded 100 percent placement for its first batch of students. All students are offered jobs by reputed organizations in the auto sector. Market research firm Nielsen India said that domestic fast moving consumer goods sector is expected to grow 12-13% during calendar year 2018, helped by favourable economic and policy environment. Metal firm Vedanta has won exploration licenses for 41 of the 55 oil and gas blocks auctioned in the first round of the open acreage licensing policy, with state-run Oil and Natural Gas Corp winning barely two.



FUND FLOWS

| | LATEST | MTD | YTD |
|-------------|--------|-------|--------|
| FII(USD mm) | 62.2 | 14.0 | (23.1) |
| MF(INR cr) | 739.4 | 186.2 | 378.3 |

MARKET TURNOVER

| | LATEST | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 35,505 | 35,844 | 33,520 |
| F&O(INR cr) | 993,882 | 953,116 | 884,784 |

MARKET VOLATILITY

| | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 12.2 | 12.5 | 14.3 |
| NSE VIX | 12.4 | 12.8 | 13.2 |

NSE INDICES / SECTORAL PERFORMANCE

| | LATEST | % 1D | % YTD | | LATEST | % 1D | % YTD |
|--------|--------|---------|---------|-------------|--------|---------|---------|
| Banks | 28,270 | 0.0 % | 16.2 % | Energy | 16,242 | 1.0 % | 22.2 % |
| IT | 15,583 | 0.4 % | 22.6 % | Pharma | 10,050 | (0.4) % | 16.6 % |
| Metals | 3,597 | 1.8 % | 1.6 % | Finance | 11,797 | 0.5 % | 15.0 % |
| Auto | 11,044 | 0.5 % | (0.1) % | PSU | 3,234 | (1.5) % | 13.3 % |
| FMCG | 32,494 | (0.3) % | 22.6 % | Real Estate | 271 | (0.9) % | (8.5) % |

NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D | % YTD | TOP LOSERS | LATEST | % 1D | % YTD |
|-------------|--------|-------|--------|------------|--------|---------|----------|
| Hindalco I | 239 | 3.8 % | 13.1 % | GAIL (Indi | 364 | (5.0) % | 12.1 % |
| JSW Steel | 366 | 3.0 % | 23.5 % | Bank of Ba | 144 | (4.1) % | 1.4 % |
| Godrej Con | 1,442 | 2.7 % | 29.3 % | Rural Elec | 115 | (4.0) % | (10.4) % |
| Adani Port | 387 | 2.2 % | 4.7 % | Power Fin. | 82 | (3.8) % | (6.2) % |
| Reliance I | 1,319 | 2.1 % | 47.7 % | Yes Bank | 371 | (3.2) % | 21.0 % |

EVENTS CALENDAR

| EVENT | DATE | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Current Account Balance (2Q) | 29-08-2018 | 12:30 | CAD | - | - |
| Credit Suisse Survey Expectations (AUG) | 29-08-2018 | 8:00 | CHF | - | (4) |
| German GfK Consumer Confidence (SEP) | 29-08-2018 | 6:00 | EUR | - | 10.6 |
| French Gross Domestic Product (QoQ) (2Q P) | 29-08-2018 | 6:45 | EUR | - | 0.002 |
| French Gross Domestic Product (YoY) (2Q P) | 29-08-2018 | 6:45 | EUR | - | 0.017 |
| BOJ Outright Bond Purchase 10~25 Years | 29-08-2018 | 1:10 | JPY | - | - |
| BOJ Outright Bond Purchase 25 Years~ | 29-08-2018 | 1:10 | JPY | - | - |
| BOJ Suzuki speaks in Naha | 29-08-2018 | 1:30 | JPY | - | - |
| Foreign Buying Japan Bonds (AUG 24) | 29-08-2018 | 23:50 | JPY | - | - |
| Foreign Buying Japan Stocks (AUG 24) | 29-08-2018 | 23:50 | JPY | - | - |
| Japan Buying Foreign Bonds (Yen) (AUG 24) | 29-08-2018 | 23:50 | JPY | - | - |
| Japan Buying Foreign Stocks (Yen) (AUG 24) | 29-08-2018 | 23:50 | JPY | - | - |
| Large Retailers' Sales (JUL) | 29-08-2018 | 23:50 | JPY | - | 0.015 |
| Loans & Discounts Corp (YoY) (JUL) | 29-08-2018 | 23:50 | JPY | - | 0.0317 |
| Retail Trade (YoY) (JUL) | 29-08-2018 | 23:50 | JPY | - | 0.018 |
| Retail Trade s.a. (MoM) (JUL) | 29-08-2018 | 23:50 | JPY | - | 0.015 |
| Consumer Confidence Index (AUG) | 29-08-2018 | 5:00 | JPY | - | 43.5 |
| Building Permits (MoM) (JUL) | 29-08-2018 | 22:45 | NZD | - | (0.076) |
| MBA Mortgage Applications (AUG 24) | 29-08-2018 | 11:00 | USD | - | - |
| Core Personal Consumption Expenditure (QoQ) (2Q S) | 29-08-2018 | 12:30 | USD | - | 0.02 |
| Gross Domestic Product Annualized (QoQ) (2Q S) | 29-08-2018 | 12:30 | USD | - | 0.041 |
| Gross Domestic Product Price Index (2Q S) | 29-08-2018 | 12:30 | USD | - | 0.03 |
| Personal Consumption (2Q S) | 29-08-2018 | 12:30 | USD | - | 0.04 |
| Pending Home Sales (MoM) (JUL) | 29-08-2018 | 14:00 | USD | - | 0.009 |
| Pending Home Sales (YoY) (JUL) | 29-08-2018 | 14:00 | USD | - | (0.04) |
| DOE Cushing OK Crude Inventory (AUG 24) | 29-08-2018 | 14:30 | USD | - | - |
| DOE U.S. Crude Oil Inventories (AUG 24) | 29-08-2018 | 14:30 | USD | - | - |
| DOE U.S. Distillate Inventory (AUG 24) | 29-08-2018 | 14:30 | USD | - | - |
| DOE U.S. Gasoline Inventories (AUG 24) | 29-08-2018 | 14:30 | USD | - | - |



| | | | | | |
|--|------------|-------|-----|---|---|
| U.S. to Sell 2-Year Floating Rate Notes (AUG 29) | 29-08-2018 | 15:30 | USD | - | - |
| U.S. to Sell 7-Year Notes (AUG 29) | 29-08-2018 | 17:00 | USD | - | - |

..... **End of Report**

