



29 Aug.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,046	(0.5) %	(5.3) %
BSE SENSEX	37,452	(0.5) %	(3.7) %
CNX BANK	27,804	(1.1) %	(8.3) %
CNX MIDCAP	15,561	(1.0) %	(15.1) %
CNX SMALLCAP	5,427	(0.6) %	(19.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,036	1.0 %	11.6 %
S&P 500	2,888	0.7 %	15.2 %
FTSE 100	7,115	0.4 %	5.6 %
HANG SENG	25,615	(0.2) %	1.9 %
NIKKEI	20,479	0.1 %	4.7 %
SHANGHAI COMPOSITE	2,894	(0.3) %	17.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.67	(0.3) %	3.2 %
EUR/USD	1.11	(0.3) %	(3.2) %
GBP/USD	1.22	(0.1) %	(4.0) %
USD/JPY	105.88	0.1 %	(3.4) %
USD/AUD	1.48	0.3 %	4.4 %
USD/SGD	1.39	0.0 %	1.8 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	56	3.2 %	19.3 %
Gold(INR/10g)	38,795	1.0 %	23.0 %
Gold Comex(USD/oz)	1,542	1.0 %	19.5 %
SILVER(INR/1Kg)	46,572	2.9 %	21.7 %
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: German consumer confidence is set to remain unchanged in September as the downturn in economic confidence was largely offset by the propensity to buy, survey data from market research group GfK showed Wednesday. The forward-looking consumer sentiment index held steady at 9.7 in September, the Nuremberg-based GfK said. Eurozone bank lending to households increased the most since early 2009 in July and money supply growth accelerated, data from the European Central Bank showed Wednesday. Loans to households rose 3.4% year-on-year in July in Eurozone, slightly higher than the 3.3% increase in June. This was the fastest growth since January 2009. Australia's construction work done decreased by a seasonally adjusted 3.8% sequentially in the June quarter, the Australian Bureau of Statistics reported on Wednesday. Even at low levels of interest rates, monetary policy remains as effective as ever at providing timely economic stimulus, Reserve Bank of New Zealand Governor Adrian Orr said Wednesday.

Global Equities: Traders turned cautious on trade deal with China and worries over recession. However, the DOW surged 1% on gains in energy counters.

Indian Economy: Government allowed 100% FDI under automatic route for coal mining, activities including associated processing infrastructure will attract international players to create an efficient and competitive coal market. Manufacturing through contract contributes equally to the objective of Make in India. FDI now being permitted under automatic route in contract manufacturing. India Ratings and Research has revised downward the country's GDP growth estimate to 6.7% from an earlier estimate of 7.3% for the current fiscal due to weak consumption demand, monsoon and slowdown in manufacturing growth. Differential regime between domestic investors and FPIs existed even prior to General Budget 2019, CBDT clarified. CBDT said that an incorrect perception is being created in a section of media as if announcements made by Finance Minister which brought in a number of responsive structural measures to boost up the economy, have created a differential regime between FPIs and domestic investors including AIF category III.

Equity Markets: Key equity benchmarks snapped three-day winning streak amid broad based selling pressure. Concerns about a global recession spoiled trading sentiment. Barring IT and realty stocks, selling was witnessed across all sectors with metal stocks declining the most. S&P BSE Sensex, fell 189.43 points or 0.50% to 37,451.84. Nifty opened above 11,100 mark but soon gave up that level amid constant selling pressure.

Corporate News: Infosys has been named the Microsoft 2019 Global Alliance SI Partner of the Year. The company has entered into collaboration with Microsoft and JCI to deliver smart buildings and spaces solutions (SB&S) that will accelerate the convergence of physical and digital infrastructure. Nestle India will be included in NSE Nifty 50 Index and Nifty 50 Equal Weight Index from 27 September. It will be replacing Indiabulls Housing Finance Ltd. ABB India, BHEL, MRF and SAIL are being excluded from Nifty Next 50. Berger Paints, Indiabulls Housing Finance, Power Finance Corporation and PNB are being included into Nifty Next 50. Sugar stocks will be in focus after the Cabinet Committee on Economic Affairs has given its approval for providing a lump sum export subsidy at Rs 10448 per tonne to sugar mills for the sugar season 2019-20.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(147.6)	(118.5)	5.4
MF(INR cr)	202.7	956.4	381.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,491	36,242	34,452
F&O(INR cr)	1,463,805	1,485,788	1,279,300

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	20.3	18.8	15.4
NSE VIX	16.8	16.5	17.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,804	(1.1) %	(8.3) %	Energy	14,445	(1.1) %	(12.6) %
IT	15,880	1.3 %	0.2 %	Pharma	7,739	(0.9) %	(17.5) %
Metals	2,226	(3.4) %	(28.2) %	Finance	12,575	(0.6) %	0.6 %
Auto	7,019	(1.9) %	(16.6) %	PSU	2,517	(1.3) %	(25.6) %
FMCG	28,815	(0.4) %	(4.6) %	Real Estate	263	2.4 %	(1.7) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	417	4.5 %	15.0 %	Yes Bank	60	(7.8) %	(78.4) %
ICICI Lomb	1,250	2.9 %	23.1 %	Vodafone I	5	(5.7) %	(71.8) %
HCL Techno	1,124	2.8 %	1.2 %	S A I L	31	(5.3) %	(43.5) %
B P C L	351	2.4 %	(10.6) %	Vedanta	132	(4.2) %	(29.9) %
Cadila Hea	223	2.3 %	(35.1) %	Motherson	98	(4.1) %	(36.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Capital Expenditure (2Q)	29-08-2019	01:30	AUD	-	-
Current Account Balance (2Q)	29-08-2019	12:30	CAD	-	(\$17.35b)
CFIB Business Barometer (AUG)	29-08-2019	14:00	CAD	-	-
French Gross Domestic Product (QoQ) (2Q F)	29-08-2019	06:45	EUR	-	-
French Gross Domestic Product (YoY) (2Q F)	29-08-2019	06:45	EUR	-	-
German Unemployment Change (000's) (AUG)	29-08-2019	07:55	EUR	-	1.0k
German Unemployment Claims Rate s.a. (AUG)	29-08-2019	07:55	EUR	-	-
Euro-Zone Business Climate Indicator (AUG)	29-08-2019	09:00	EUR	-	-
Euro-Zone Consumer Confidence (AUG F)	29-08-2019	09:00	EUR	-	-
Euro-Zone Economic Confidence (AUG)	29-08-2019	09:00	EUR	-	-
Euro-Zone Industrial Confidence (AUG)	29-08-2019	09:00	EUR	-	-
Euro-Zone Services Confidence (AUG)	29-08-2019	09:00	EUR	-	-
German Consumer Price Index (MoM) (AUG P)	29-08-2019	12:00	EUR	-	-
German Consumer Price Index (YoY) (AUG P)	29-08-2019	12:00	EUR	-	-
GfK Consumer Confidence (AUG)	29-08-2019	23:01	GBP	-	-
Lloyds Business Barometer (AUG)	29-08-2019	23:01	GBP	-	-
BOJ Hitoshi Suzuki speaks in Kumamoto	29-08-2019	01:30	JPY	-	-
Jobless Rate (JUL)	29-08-2019	23:30	JPY	-	-
Job-To-Applicant Ratio (JUL)	29-08-2019	23:30	JPY	-	-
Tokyo Consumer Price Index (YoY) (AUG)	29-08-2019	23:30	JPY	-	-
Tokyo Consumer Price Index Ex-Fresh Food (YoY) (AUG)	29-08-2019	23:30	JPY	-	-
Tokyo CPI Ex-Fresh Food, Energy (YoY) (AUG)	29-08-2019	23:30	JPY	-	-
Industrial Production (MoM) (JUL P)	29-08-2019	23:50	JPY	-	-
Industrial Production (YoY) (JUL P)	29-08-2019	23:50	JPY	-	-
Large Retailers' Sales (JUL)	29-08-2019	23:50	JPY	-	-
Retail Trade (YoY) (JUL)	29-08-2019	23:50	JPY	-	-
Retail Trade s.a. (MoM) (JUL)	29-08-2019	23:50	JPY	-	-
ANZ Activity Outlook (AUG)	29-08-2019	01:00	NZD	-	-
ANZ Business Confidence (AUG)	29-08-2019	01:00	NZD	-	-



ANZ Consumer Confidence (MoM) (AUG)	29-08-2019	22:00	NZD	-	-
ANZ Consumer Confidence Index (AUG)	29-08-2019	22:00	NZD	-	-
Building Permits (MoM) (JUL)	29-08-2019	22:45	NZD	-	-
Advance Goods Trade Balance (JUL)	29-08-2019	12:30	USD	-	(\$74.2b)
Continuing Claims (AUG 17)	29-08-2019	12:30	USD	-	1674k
Core PCE (QoQ) (2Q S)	29-08-2019	12:30	USD	-	-
Gross Domestic Product Annualized (QoQ) (2Q S)	29-08-2019	12:30	USD	-	-
Gross Domestic Product Price Index (2Q S)	29-08-2019	12:30	USD	-	-
Initial Jobless Claims (AUG 24)	29-08-2019	12:30	USD	-	209k
Personal Consumption (2Q S)	29-08-2019	12:30	USD	-	-
Retail Inventories (MoM) (JUL)	29-08-2019	12:30	USD	-	-
Wholesale Inventories (MoM) (JUL P)	29-08-2019	12:30	USD	-	-
Pending Home Sales (MoM) (JUL)	29-08-2019	14:00	USD	-	-
Pending Home Sales (YoY) (JUL)	29-08-2019	14:00	USD	-	-
EIA Natural Gas Storage Change (AUG 23)	29-08-2019	14:30	USD	-	-
U.S. to Sell 4-Week Bills	29-08-2019	15:30	USD	-	-
U.S. to Sell 8-Week Bills	29-08-2019	15:30	USD	-	-
U.S. to Sell USD32 Bln 7-Year Notes	29-08-2019	17:00	USD	-	-

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