



30 Jul.2019

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,189	0.0 %	(4.1) %
BSE SENSEX	37,686	(0.5) %	(3.0) %
CNX BANK	29,296	0.0 %	(3.4) %
CNX MIDCAP	16,012	0.0 %	(12.7) %
CNX SMALLCAP	5,644	0.0 %	(16.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,221	0.1 %	16.7 %
S&P 500	3,021	(0.2) %	20.5 %
FTSE 100	7,687	1.8 %	14.1 %
HANG SENG	28,106	(1.0) %	11.8 %
NIKKEI	21,617	(0.2) %	10.5 %
SHANGHAI COMPOSITE	2,941	(0.1) %	19.3 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	68.66	(0.3) %	(1.1) %
EUR/USD	1.11	(0.1) %	(2.8) %
GBP/USD	1.23	(1.4) %	(3.6) %
USD/JPY	108.69	0.5 %	(0.9) %
USD/AUD	1.45	1.1 %	1.9 %
USD/SGD	1.37	0.5 %	0.5 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.9 %	22.9 %
Gold(INR/10g)	34,730	(0.1) %	10.1 %
Gold Comex(USD/oz)	1,424	0.3 %	10.3 %
SILVER(INR/1Kg)	40,682	(0.3) %	6.3 %
Aluminium(USD/MT)	1,774	(0.2) %	(4.5) %
Copper(USD/MT)	5,950	349.0 %	1.9 %

FIXED INCOME

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

Global Economy: UK mortgage approvals declined to the lowest since January, the Bank of England reported. Number of mortgage approvals in UK fell to 66,440 in June from 65,647 in May. Annual growth rate of mortgage lending in UK remained stable at 3.1%. UK consumer credit grew GBP 1.04 billion, which was bigger than the GBP 906 million increase registered a month ago. However, the annual growth rate eased to 5.5%. Value of retail sales in Japan was roughly unchanged in June on a seasonally adjusted basis, the Ministry of Economy, Trade and Industry said. Japan retail sales advanced 0.5% on a yearly basis following the upwardly revised 1.3% jump in the previous month.

Global Equities: Sentiments mixed ahead of key central banking action. Asian stocks eased as traders eyed US-China trade talks. British pound fell to a two-year low against the dollar.

Indian Economy: Ministry of Road Transport & Highways has issued a draft notification amending Central Motor Vehicle Rules. Ministry of Road Transport set to allow motor vehicles and their parts, components, assemblies, sub-assemblies to be affixed with permanent and nearly invisible microdots that can be read physically with a microscope and identified with ultra violet light source. Ministry of Housing & Urban Affairs stated that projects tendered accelerated by 170% Since June 2018. Ratings agency Moody's cautioned that economic growth in India over the next 12-18 months will remain weaker than in prior years. Fairly widespread to widespread rainfall with isolated heavy to very heavy falls is likely over central & adjoining peninsular India, northwest India and west coast in next two days said IMD. Finance minister Nirmala Sitharaman has called for a significant reduction in the central bank's interest rates according to media reports.

Equity Markets: Local markets edged lower on Monday, resuming downtrend after a recovery on Friday. Domestic shares mirrored weakness in other Asian shares ahead of US Fed's policy review starting on Tuesday. Nifty closed below 11,200 for the first time since 15 May 2019. S&P BSE Sensex fell 196.42 points or 0.52% to 37,686.37. Nifty 50 index fell 95.10 points or 0.84% to 11,189.20.

Corporate News: Infosys reported that Al Ahli Bank of Kuwait has partnered with EdgeVerve Systems, a subsidiary of Infosys to steer its automation journey using AssistEdge Robotic Process Automation. NIIT limited announced that it has been selected as a 2019 Top 20 Gamification Company for the sixth consecutive year by TrainingIndustry.com. JSW Steel's net profit declined by more than half in the first quarter of the financial year hit by lower sales volume on account of tepid public spending on infrastructure as well as weak demand from the automotive and consumer durables sectors. Consolidated net profit fell by 57% at Rs 1,008 crore as the company had to suffer losses on account of inventory pileup.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	436.3	(78.4)	36.6
MF(INR cr)	1,412.9	441.4	195.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	33,321	32,580	33,955
F&O(INR cr)	898,332	1,221,577	1,229,368

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.8	13.1	14.7
NSE VIX	13.1	12.9	18.1

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	29,296	(0.1) %	(3.4) %	Energy	14,764	(1.0) %	(10.7) %
IT	15,401	0.3 %	(2.8) %	Pharma	8,040	(1.7) %	(14.2) %
Metals	2,612	(3.0) %	(15.8) %	Finance	12,827	(0.4) %	2.6 %
Auto	6,906	(3.6) %	(17.9) %	PSU	2,849	(0.5) %	(15.8) %
FMCG	28,975	(0.6) %	(4.0) %	Real Estate	272	(0.9) %	1.7 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Bank	429	3.3 %	7.8 %	Vodafone I	7	(27.0) %	(62.0) %
ICICI Lomb	1,174	2.9 %	15.6 %	Indiabulls	560	(10.4) %	(33.9) %
Avenue Sup	1,450	1.7 %	(2.9) %	Grasim Ind	796	(9.1) %	(7.2) %
HCL Techno	1,015	1.4 %	(8.6) %	Tata Motor	138	(6.5) %	(26.6) %
United Bre	1,421	1.2 %	0.6 %	Tata Motor	67	(6.1) %	(27.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (JUN)	30-07-2019	1:30	AUD	-	0.007
Building Approvals (YoY) (JUN)	30-07-2019	1:30	AUD	-	(0.196)
KOF Leading Indicator (JUL)	30-07-2019	7:00	CHF	-	93.6
German Consumer Price Index (MoM) (JUL P)	30-07-2019	12:00	EUR	-	0.003
German Consumer Price Index (YoY) (JUL P)	30-07-2019	12:00	EUR	-	0.016
French Gross Domestic Product (QoQ) (2Q P)	30-07-2019	5:30	EUR	-	0.003
French Gross Domestic Product (YoY) (2Q P)	30-07-2019	5:30	EUR	-	0.012
German GfK Consumer Confidence (AUG)	30-07-2019	6:00	EUR	-	9.8
Euro-Zone Business Climate Indicator (JUL)	30-07-2019	9:00	EUR	-	0.17
Euro-Zone Consumer Confidence (JUL F)	30-07-2019	9:00	EUR	-	(6.6)
Euro-Zone Economic Confidence (JUL)	30-07-2019	9:00	EUR	-	103.3
Euro-Zone Industrial Confidence (JUL)	30-07-2019	9:00	EUR	-	(5.6)
Euro-Zone Services Confidence (JUL)	30-07-2019	9:00	EUR	-	11
BRC Shop Price Index (YoY) (JUL)	30-07-2019	23:01	GBP	-	(0.001)
GfK Consumer Confidence (JUL)	30-07-2019	23:01	GBP	-	(13)
Lloyds Business Barometer (JUL)	30-07-2019	23:01	GBP	-	13
Loans & Discounts Corp (YoY) (JUN)	30-07-2019	23:50	JPY	-	0.0324
PCE Core (MoM) (JUN)	30-07-2019	12:30	USD	-	0.002
PCE Core (YoY) (JUN)	30-07-2019	12:30	USD	-	0.016
PCE Deflator (MoM) (JUN)	30-07-2019	12:30	USD	-	0.002
PCE Deflator (YoY) (JUN)	30-07-2019	12:30	USD	-	0.015
Personal Income (JUN)	30-07-2019	12:30	USD	-	0.005
Personal Spending (JUN)	30-07-2019	12:30	USD	-	0.004
Real Personal Spending (JUN)	30-07-2019	12:30	USD	-	0.002
S&P CoreLogic CS 20-City (MoM) SA (MAY)	30-07-2019	13:00	USD	-	0
S&P/Case-Shiller 20-City Index n.s.a (MAY)	30-07-2019	13:00	USD	-	215.68
S&P/Case-Shiller Composite-20 (YoY) (MAY)	30-07-2019	13:00	USD	-	0.0254
S&P/Case-Shiller US Home Price Index (MAY)	30-07-2019	13:00	USD	-	207.97
S&P/Case-Shiller US Home Price Index (YoY) (MAY)	30-07-2019	13:00	USD	-	0.0254



Conf. Board Expectations (JUL)	30-07-2019	14:00	USD	-	94.1
Conf. Board Present Situation (JUL)	30-07-2019	14:00	USD	-	162.6
Consumer Confidence Index (JUL)	30-07-2019	14:00	USD	-	121.5
Pending Home Sales (MoM) (JUN)	30-07-2019	14:00	USD	-	0.011
Pending Home Sales (YoY) (JUN)	30-07-2019	14:00	USD	-	(0.008)

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