



30 Aug.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,675	(0.1) %	14.3 %
BSE SENSEX	38,723	(0.4) %	16.4 %
CNX BANK	28,065	(0.6) %	15.4 %
CNX MIDCAP	19,802	(0.1) %	3.7 %
CNX SMALLCAP	7,628	0.3 %	(3.8) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,125	0.2 %	5.2 %
S&P 500	2,914	0.6 %	8.1 %
FTSE 100	7,563	(0.7) %	(1.1) %
HANG SENG	28,416	0.2 %	(6.9) %
NIKKEI	22,848	0.2 %	(2.8) %
SHANGHAI COMPOSITE	2,769	(0.3) %	(17.3) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	70.59	0.6 %	10.9 %
EUR/USD	1.17	0.3 %	(2.5) %
GBP/USD	1.30	1.3 %	(3.5) %
USD/JPY	111.64	0.3 %	(1.0) %
USD/AUD	1.37	0.6 %	7.3 %
USD/SGD	1.36	0.1 %	2.2 %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	1.4 %	15.1 %
Gold(INR/10g)	30,048	(0.2) %	2.4 %
Gold Comex(USD/oz)	1,210	(0.1) %	(7.6) %
SILVER(INR/1Kg)	37,039	(1.2) %	(4.1) %
Aluminium(USD/MT)	2,116	1.3 %	(6.2) %
Copper(USD/MT)	6,065	(0.9) %	(15.5) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	0.0 %	0.4 %

Global Economy: Economic activity in the US grew by more than initially estimated in the second quarter, according to a report released by the Commerce Department on Wednesday. The real gross domestic product rose by 4.2% in the second quarter compared to the previously reported 4.1%. The upward revised increase in GDP in the second quarter now represents the fastest growth since a 4.9% surge in the third quarter of 2014. German forward-looking consumer sentiment index dropped to 10.5 in September from 10.6 in August, GfK said Wednesday. While economic expectations improved, income expectations and the propensity to buy declined in August. The economic expectations index rose to 22.2 in August from 15.7 in July. Despite a trade conflict with the USA as well as increasing energy prices, the German consumer is once again showing greater economic optimism. Meanwhile, the income expectations indicator came in at 52.6 versus 57.5 a month ago. A lower value was last measured in November 2017 at 47.9 points.

Global Equities: US stocks maintained record spree on upbeat GDP reading. European stocks were higher, while most Asian settled higher.

Indian Economy: In an unsettled international environment, incoming data configure favourable conditions for an acceleration of activity in the Indian economy, the Reserve Bank Of India (RBI) noted in its latest Annual Report. Corporates are reporting robust sales growth and improvement in profitability as pricing power returns. Services sector activity is also set to gather pace, as high frequency indicators suggest. Revenue-earning freight traffic of railways has picked up, driven by stepped-up movement in coal, fertiliser and cement. The uptrend in construction is expected to continue going forward, given the government's push for infrastructure - affordable housing, roads, and ports - and the robust expansion in the production of cement. Keeping in view the evolving economic conditions, real GDP growth for 2018-19 is expected to increase to 7.4% from 6.7% in the previous year, with risks evenly balanced.

Equity Markets: Local stocks witnessed profit booking yesterday ahead of the August derivatives expiry today. Global cues were mixed. Domestic stocks settled with modest losses weighed by slide in index heavyweights Reliance Industries, HDFC Bank and Infosys. After a volatile opening, indices were almost flat in morning trade. Following some range bound trading, indices hit fresh intraday low in late trade as selling intensified.

Corporate News: The Indian Rupee stayed under continued pressure on Wednesday, as the currency closed at a fresh lifetime low of 70.59 by, shedding nearly 49 paise against the dollar amid corrective action in local equities. Zensar Technologies has been positioned as an Aspirant in the 'Enterprise QA Services PEAK Matrix Assessment 2018: Quality Assurance to Brand Assurance: AI Driving the Evolution'. Zensar is one of the 23 service providers cited in the research and evaluated on the vision and capability and market impact. After receiving nearly Rs 100 crore recovery notice from the Goa government for royalty non-payment, Vedanta's Sesa Goa Iron Ore division clarified that the matter relates to the reconciliation of royalty due to the varying interpretation of the iron ore value and not to illegal mining. Indian Oil Corporation will invest over Rs 286 crore to enhance its LPG bottling capacity, including setting up of two greenfield plants, in North East by 2020.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(7.0)	12.8	(22.9)
MF(INR cr)	(150.7)	168.4	373.2

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,353	35,976	33,566
F&O(INR cr)	1,080,212	959,805	886,646

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.3	12.4	14.3
NSE VIX	12.4	12.7	13.2

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	28,224	(0.2) %	16.0 %	Energy	16,060	(1.1) %	20.8 %
IT	15,525	(0.4) %	22.2 %	Pharma	10,009	(0.4) %	16.1 %
Metals	3,634	1.0 %	2.7 %	Finance	11,807	0.1 %	15.1 %
Auto	11,057	0.1 %	(0.0) %	PSU	3,286	1.6 %	15.1 %
FMCG	32,430	(0.2) %	22.4 %	Real Estate	274	1.2 %	(7.4) %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
JSW Steel	399	9.0 %	34.5 %	Interglobe	967	(5.6) %	(27.2) %
Bosch	20,078	6.3 %	8.4 %	Idea Cellu	50	(3.0) %	(36.3) %
UPL	680	4.0 %	(9.6) %	Coal India	286	(2.9) %	3.2 %
B H E L	81	3.8 %	(2.2) %	Cadila Hea	387	(2.6) %	0.5 %
Power Fin.	85	3.6 %	(2.8) %	Power Grid	193	(2.1) %	(0.9) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (JUL)	30-08-2018	1:30	AUD	-	0.064
Building Approvals (YoY) (JUL)	30-08-2018	1:30	AUD	-	0.016
Private Capital Expenditure (2Q)	30-08-2018	1:30	AUD	-	0.004
Gross Domestic Product (MoM) (JUN)	30-08-2018	12:30	CAD	-	0.005
Gross Domestic Product (YoY) (JUN)	30-08-2018	12:30	CAD	-	0.026
Quarterly Gross Domestic Product Annualized (2Q)	30-08-2018	12:30	CAD	-	0.013
KOF Leading Indicator (AUG)	30-08-2018	7:00	CHF	-	101.1
Swift Global Payments CNY (JUL)	30-08-2018	1:00	CNY	-	0.0181
German Consumer Price Index (MoM) (AUG P)	30-08-2018	12:00	EUR	-	0.003
German Consumer Price Index (YoY) (AUG P)	30-08-2018	12:00	EUR	-	0.02
German Unemployment Change (000's) (AUG)	30-08-2018	7:55	EUR	-	-
German Unemployment Claims Rate s.a. (AUG)	30-08-2018	7:55	EUR	-	0.052
Euro-Zone Business Climate Indicator (AUG)	30-08-2018	9:00	EUR	-	1.29
Euro-Zone Consumer Confidence (AUG F)	30-08-2018	9:00	EUR	-	(1.9)
Euro-Zone Economic Confidence (AUG)	30-08-2018	9:00	EUR	-	112.1
Euro-Zone Industrial Confidence (AUG)	30-08-2018	9:00	EUR	-	5.8
Euro-Zone Services Confidence (AUG)	30-08-2018	9:00	EUR	-	15.3
GfK Consumer Confidence (AUG)	30-08-2018	23:01	GBP	-	(10)
Lloyds Business Barometer (AUG)	30-08-2018	23:01	GBP	-	29
M4 Ex IOFCs 3M Annualised (JUL)	30-08-2018	8:30	GBP	-	0.036
M4 Money Supply (YoY) (JUL)	30-08-2018	8:30	GBP	-	0.017
Money Supply M4 (MoM) (JUL)	30-08-2018	8:30	GBP	-	(0.003)
Mortgage Approvals (JUL)	30-08-2018	8:30	GBP	-	-
Net Consumer Credit (JUL)	30-08-2018	8:30	GBP	-	-
Net Lending Sec. on Dwellings (JUL)	30-08-2018	8:30	GBP	-	-
Jobless Rate (JUL)	30-08-2018	23:30	JPY	-	0.024
Job-To-Applicant Ratio (JUL)	30-08-2018	23:30	JPY	-	1.62
Tokyo Consumer Price Index (YoY) (AUG)	30-08-2018	23:30	JPY	-	0.009
Tokyo Consumer Price Index Ex. Fresh Food (YoY) (AUG)	30-08-2018	23:30	JPY	-	0.009



Tokyo Consumer Price Index Ex-Fresh Food, Energy (YoY) (AUG)	30-08-2018	23:30	JPY	-	0.005
Industrial Production (MoM) (JUL P)	30-08-2018	23:50	JPY	-	(0.018)
Industrial Production (YoY) (JUL P)	30-08-2018	23:50	JPY	-	(0.009)
ANZ Activity Outlook (AUG)	30-08-2018	1:00	NZD	-	3.8
ANZ Business Confidence (AUG)	30-08-2018	1:00	NZD	-	(44.9)
ANZ Consumer Confidence (MoM) (AUG)	30-08-2018	22:00	NZD	-	(0.013)
ANZ Consumer Confidence Index (AUG)	30-08-2018	22:00	NZD	-	118.4
Continuing Claims (AUG 18)	30-08-2018	12:30	USD	-	-
Initial Jobless Claims (AUG 25)	30-08-2018	12:30	USD	-	-
Personal Consumption Expenditure Core (MoM) (JUL)	30-08-2018	12:30	USD	-	0.001
Personal Consumption Expenditure Core (YoY) (JUL)	30-08-2018	12:30	USD	-	0.019
Personal Consumption Expenditure Deflator (MoM) (JUL)	30-08-2018	12:30	USD	-	0.001
Personal Consumption Expenditure Deflator (YoY) (JUL)	30-08-2018	12:30	USD	-	0.022
Personal Income (JUL)	30-08-2018	12:30	USD	-	0.004
Personal Spending (JUL)	30-08-2018	12:30	USD	-	0.004
Real Personal Spending (JUL)	30-08-2018	12:30	USD	-	0.003
EIA Natural Gas Storage Change (AUG 24)	30-08-2018	14:30	USD	-	48
EIA Working Natural Gas Implied Flow (AUG 24)	30-08-2018	14:30	USD	-	48

..... End of Report

