



30 Aug.2019

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,988	0.4 %	(5.8) %
BSE SENSEX	37,069	(1.0) %	(4.2) %
CNX BANK	27,408	0.4 %	(9.6) %
CNX MIDCAP	15,560	0.4 %	(15.1) %
CNX SMALLCAP	5,387	0.1 %	(20.1) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	26,362	1.3 %	13.0 %
S&P 500	2,925	1.3 %	16.7 %
FTSE 100	7,184	1.0 %	6.7 %
HANG SENG	25,704	0.3 %	2.3 %
NIKKEI	20,461	(0.1) %	4.6 %
SHANGHAI COMPOSITE	2,891	(0.1) %	17.3 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	71.69	0.2 %	3.3 %
EUR/USD	1.11	(0.3) %	(3.3) %
GBP/USD	1.22	(0.5) %	(4.3) %
USD/JPY	106.27	0.5 %	(3.1) %
USD/AUD	1.49	0.4 %	4.5 %
USD/SGD	1.39	(0.0) %	1.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	57	1.7 %	21.5 %
Gold(INR/10g)	38,743	(0.1) %	22.9 %
Gold Comex(USD/oz)	1,538	0.0 %	19.2 %
SILVER(INR/1Kg)	47,086	1.1 %	23.1 %
Aluminium(USD/MT)	1,714	(0.6) %	(7.8) %
Copper(USD/MT)	5,722	1.2 %	(2.0) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

**Global Economy:** US Commerce Department said gross domestic product increased by 2% in the second quarter compared to the previously reported 2.1% growth. US seasonally adjusted initial jobless claims were 215,000 in the week ending August 24th, an increase of 4,000 from the previous week's revised level. The previous week's level was revised up by 2,000 from 209,000 to 211,000. The 4-week moving average was 214,500, a decrease of 500 from the previous week's revised average. Eurozone economic confidence improved unexpectedly in August, survey data from European Commission showed Thursday. The economic sentiment index rose to 103.1 in August from 102.7 in July. Germany's jobless rate fell slightly to a seasonally adjusted 3 percent in July from 3.1 percent in June, figures from Destatis showed Thursday. UK car production declined for the 14th consecutive month in July reflecting a notable contraction in foreign demand, data published by the Society of Motor Manufacturers and Traders, or SMMT, showed Thursday. UK Car production was down 10.6% from last year to 108,239 units in July as ongoing weakness in major EU and Asian markets coupled with some key model changes affected performance. Japan consumer confidence index fell to a seasonally adjusted 37.1 in August from 37.8 in July, to the lowest level in nearly five-and-a-half years, data from the Cabinet Office showed. Australia's total new capital expenditure decreased 0.5% sequentially in the second quarter, the Australian Bureau of Statistics revealed Thursday. On a yearly basis, overall capex was down 1% in the second quarter.

**Global Equities:** US stocks rose on indications that China is seeking to de-escalate the trade war with the US. DOW jumped 1.3%.

**Indian Economy:** Reviving consumption demand and private investment has assumed the highest priority in 2019-20, the Reserve Bank Of India (RBI) noted in its latest Annual Report. Half way through the financial year 2019-20, several uncertainties weigh on the near-term outlook for the global economy and India, stated the RBI. Total horticulture production of the country is estimated to be 313.85 million tonnes which is 0.69% higher than the horticulture production of 311.71 million tonnes in 2017-18. India and Iran will be able to conclude Preferential Trade Agreement (PTA) between the two countries latest by this year end as very limited formalities remain to be completed on this front which will make their trade cheaper and simpler, stated Ambassador of Iran, Ali Chegeni.

**Equity Markets:** Key domestic equity indices declined for second consecutive day amid weakness in financial stocks. Fears of a global recession, ongoing US-China trade tensions and uncertainty over Brexit hurt investor sentiment. S&P BSE Sensex fell 382.91 points or 1.02% to 37,068.93. Nifty 50 index fell 97.80 points or 0.89% to 10,948.30. Trading was volatile as the August 2019 F&O contracts expired today, 29 August 2019.

**Corporate News:** Oil Marketing Companies can see some selling pressure as WTI Crude oil soared towards \$57 per barrel. Wipro Limited announced the expansion of its strategic partnership with Google Cloud to accelerate cloud adoption and digital transformation for global enterprises. Passenger vehicle sales in India are likely to decline in the range of 4-7% this fiscal. The auto industry has already registered a 21.6% plus de-growth in the first four months of 2019-20, rating agency ICRA said.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(176.4)	(121.8)	3.6
MF(INR cr)	106.2	909.1	378.7

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	34,325	36,142	34,451
F&O(INR cr)	2,804,687	1,555,204	1,294,255

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	17.9	18.8	15.5
NSE VIX	16.4	16.5	17.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,305	(1.8) %	(10.0) %	Energy	14,441	(0.0) %	(12.7) %
IT	15,885	0.0 %	0.3 %	Pharma	7,913	2.2 %	(15.6) %
Metals	2,254	1.3 %	(27.3) %	Finance	12,341	(1.9) %	(1.3) %
Auto	6,970	(0.7) %	(17.2) %	PSU	2,449	(2.7) %	(27.6) %
FMCG	28,752	(0.2) %	(4.8) %	Real Estate	264	0.4 %	(1.3) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun Pharma	435	5.2 %	(9.2) %	St Bk of I	275	(3.7) %	(14.9) %
Piramal En	1,982	4.5 %	(26.4) %	Yes Bank	57	(3.5) %	(79.2) %
Bharti Inf	258	3.9 %	(17.8) %	Shree Ceme	18,520	(3.1) %	(1.5) %
Colgate-Pa	1,252	3.2 %	(0.5) %	Vodafone I	5	(3.0) %	(72.7) %
Biocon	228	3.2 %	(26.4) %	Bank of Ba	92	(2.9) %	(30.8) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (JUL)	30-08-2019	01:30	AUD	-	-
Building Approvals (YoY) (JUL)	30-08-2019	01:30	AUD	-	-
Private Sector Credit (MoM) (JUL)	30-08-2019	01:30	AUD	-	-
Private Sector Credit (YoY) (JUL)	30-08-2019	01:30	AUD	-	-
Gross Domestic Product (MoM) (JUN)	30-08-2019	12:30	CAD	-	-
Gross Domestic Product (YoY) (JUN)	30-08-2019	12:30	CAD	-	-
Industrial Product Price (MoM) (JUL)	30-08-2019	12:30	CAD	-	-
Quarterly Gross Domestic Product Annualized (2Q)	30-08-2019	12:30	CAD	-	-
Raw Materials Price Index (MoM) (JUL)	30-08-2019	12:30	CAD	-	-
KOF Leading Indicator (AUG)	30-08-2019	07:00	CHF	-	-
German Retail Sales (MoM) (JUL)	30-08-2019	06:00	EUR	-	-
German Retail Sales (YoY) (JUL)	30-08-2019	06:00	EUR	-	-
Euro-Zone Consumer Price Index Core (YoY) (AUG A)	30-08-2019	09:00	EUR	-	-
Euro-Zone Consumer Price Index Estimate (YoY) (AUG)	30-08-2019	09:00	EUR	-	-
Euro-Zone Unemployment Rate (JUL)	30-08-2019	09:00	EUR	-	-
Italian Gross Domestic Product w.d.a. (QoQ) (2Q F)	30-08-2019	10:00	EUR	-	-
Italian Gross Domestic Product w.d.a. (YoY) (2Q F)	30-08-2019	10:00	EUR	-	-
Consumer Credit (YoY) (JUL)	30-08-2019	08:30	GBP	-	-
M4 Ex IOFCs 3M Annualised (JUL)	30-08-2019	08:30	GBP	-	-
M4 Money Supply (YoY) (JUL)	30-08-2019	08:30	GBP	-	-
Money Supply M4 (MoM) (JUL)	30-08-2019	08:30	GBP	-	-
Mortgage Approvals (JUL)	30-08-2019	08:30	GBP	-	66.4k
Net Consumer Credit (JUL)	30-08-2019	08:30	GBP	-	1.0b
Net Lending Sec. on Dwellings (JUL)	30-08-2019	08:30	GBP	-	3.7b
BOJ Outright Bond Purchase 1~3 Years	30-08-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	30-08-2019	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	30-08-2019	01:10	JPY	-	-
Vehicle Production (YoY) (JUL)	30-08-2019	04:00	JPY	-	-
Annualized Housing Starts (JUL)	30-08-2019	05:00	USD	-	0.022...



Construction Orders (YoY) (JUL)	30-08-2019	05:00	JPY	-	-
Housing Starts (YoY) (JUL)	30-08-2019	05:00	JPY	-	-
PCE Core (MoM) (JUL)	30-08-2019	12:30	USD	-	-
PCE Core (YoY) (JUL)	30-08-2019	12:30	USD	-	-
PCE Deflator (MoM) (JUL)	30-08-2019	12:30	USD	-	-
PCE Deflator (YoY) (JUL)	30-08-2019	12:30	USD	-	-
Personal Income (JUL)	30-08-2019	12:30	USD	-	-
Personal Spending (JUL)	30-08-2019	12:30	USD	-	-
Real Personal Spending (JUL)	30-08-2019	12:30	USD	-	-
Chicago Purchasing Manager (AUG)	30-08-2019	13:45	USD	-	-
U. of Mich. 1 Yr Inflation (AUG F)	30-08-2019	14:00	USD	-	-
U. of Mich. 5-10 Yr Inflation (AUG F)	30-08-2019	14:00	USD	-	-
U. of Mich. Current Conditions (AUG F)	30-08-2019	14:00	USD	-	-
U. of Mich. Expectations (AUG F)	30-08-2019	14:00	USD	-	-
U. of Mich. Sentiment (AUG F)	30-08-2019	14:00	USD	-	-
Baker Hughes U.S. Rig Count (AUG 30)	30-08-2019	17:00	USD	-	-

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