



30 Oct.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,239	(0.1) %	0.3 %
BSE SENSEX	34,067	2.2 %	2.4 %
CNX BANK	24,925	(0.1) %	2.5 %
CNX MIDCAP	16,777	0.2 %	(12.1) %
CNX SMALLCAP	5,909	0.3 %	(25.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	24,443	(1.0) %	(1.5) %
S&P 500	2,641	(0.7) %	(2.0) %
FTSE 100	7,026	1.3 %	(8.1) %
HANG SENG	24,812	0.4 %	(18.7) %
NIKKEI	21,150	(0.2) %	(10.0) %
SHANGHAI COMPOSITE	2,542	(2.2) %	(24.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	73.45	0.2 %	15.4 %
EUR/USD	1.14	0.0 %	(5.3) %
GBP/USD	1.28	(0.1) %	(5.3) %
USD/JPY	112.56	0.2 %	(0.1) %
USD/AUD	1.41	(0.0) %	10.6 %
USD/SGD	1.38	0.1 %	3.7 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	68	0.4 %	12.0 %
Gold(INR/10g)	31,784	(0.3) %	8.3 %
Gold Comex(USD/oz)	1,235	0.1 %	(5.6) %
SILVER(INR/1Kg)	38,379	0.1 %	(0.6) %
Aluminium(USD/MT)	1,961	(1.0) %	(13.1) %
Copper(USD/MT)	6,159	(0.8) %	(14.2) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.1	(0.0) %	0.6 %

**Global Economy:** World Steel Association (Worldsteel) noted in a latest update that the global crude steel production for the 64 countries reporting to the Worldsteel was 151.7 million tonnes MT in September 2018, registering a 4.4 growth. China produced 80.845 MT of crude steel as against 75.199 MT, a rise of 7.5%. It produced 699.424 MT steel in January-September 2018, up 6.1%, from 659.425 MT it had produced in the year-ago period. China's September industrial profit growth slowed for the fifth straight month, indicating that the worries over economic moderation posed by global trade jitters are manifesting. China's industrial profits grew 4.1% in September from a year ago to 545.5 billion yuan. This was sharply slower than the 9.2% increase in August. The UK mortgage approvals declined in September, figures from Bank of England showed Monday. The number of housing loan approvals fell to 65,269 in September from 66,101 in August.

**Global Equities:** Overall sentiments remain stressed on Chinese economic slowdown. European markets edged up though amid encouraging earnings reports and reports that Italy avoided a ratings downgrade.

**Indian Economy:** The demand for Indian Construction Equipment (ICE) grew by 24% in FY 2017-18, up from 13% in FY 2015-16, and the sector crossed 90,000 units for the first time due to increase in infrastructure expenditure, according to an ASSOCHAM-Feedback consulting joint study. The Indian Construction Equipment industry grew despite the hiccups of emission and GST during April and July 2017, respectively. Demonetisation also had a negligible effect on the industry growth, conducted by The Associated Chambers of Commerce and Industry of India (ASSOCHAM) jointly with consulting firm Feedback.

**Equity Markets:** Bargain buying lifted sentiments on the first session of the week after local indices tested near seven month lows. Buying was visible in banking counters and the BSE Sensex managed to end above 34000 levels, adding more than 2% on the day.

**Corporate News:** The Supreme Court has allowed the country's power regulator, Central Electricity Regulatory Commission (CERC), to amend power purchase agreements (PPAs) of three power plants in the western state of Gujarat. Adani Power Ltd, Tata Power and Essar Power operate three power plants with a total capacity of 9,940 megawatts (mw) in the state based on imported coal from Indonesia. Indian companies' investment in their overseas businesses fell by 47% to USD 1.54 billion in September 2018, Reserve Bank data showed. Indian companies had invested USD 2.91 billion in their joint ventures (JVs) and wholly-owned subsidiaries (WoS) abroad during September 2017. India's crude steel production edged up 2.1% to reach 8.520 million tonnes (MT) in September 2018, global steel body Worldsteel said in a report. GRUH Finance net sales came at Rs 480.54 crore in September 2018, up 16.06%. Quarterly Net Profit was Rs. 105.49 crore, up 35.64% while the EBITDA stands at Rs. 436.61 crore, up 20.73%.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(190.0)	(180.2)	(52.2)
MF(INR cr)	(726.8)	946.4	469.9

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,808	38,531	35,412
F&O(INR cr)	607,611	1,087,357	972,701

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	24.2	19.2	14.7
NSE VIX	19.8	19.0	14.2

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,960	2.2 %	2.6 %	Energy	13,965	3.3 %	5.1 %
IT	14,133	2.4 %	11.2 %	Pharma	9,590	5.2 %	11.2 %
Metals	3,370	2.6 %	(4.8) %	Finance	10,472	2.1 %	2.1 %
Auto	8,724	1.7 %	(21.1) %	PSU	2,778	8.0 %	(2.7) %
FMCG	28,258	0.9 %	6.6 %	Real Estate	212	3.3 %	(28.4) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Indiabulls	772	12.8 %	(38.0) %	IndusInd B	1,413	(2.3) %	(21.7) %
ICICI Bank	349	10.7 %	33.4 %	Bharat Ele	86	(2.1) %	(40.3) %
Bank of Ba	107	8.3 %	(24.5) %	HDFC Bank	1,926	(1.8) %	(0.3) %
St Bk of I	268	8.0 %	8.8 %	Kotak Mah.	1,138	(1.8) %	3.8 %
Container	620	7.9 %	(0.1) %	Eicher Mot	21,462	(1.6) %	(24.1) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (SEP)	30-10-2018	0:30	AUD	-	-
Building Approvals (YoY) (SEP)	30-10-2018	0:30	AUD	-	-
RBA's Bullock gives speech in Sydney	30-10-2018	2:10	AUD	-	-
KOF Leading Indicator (OCT)	30-10-2018	8:00	CHF	-	-
Euro-Zone Business Climate Indicator (OCT)	30-10-2018	10:00	EUR	-	-
Euro-Zone Consumer Confidence (OCT F)	30-10-2018	10:00	EUR	-	-
Euro-Zone Economic Confidence (OCT)	30-10-2018	10:00	EUR	-	-
Euro-Zone Gross Domestic Product s.a. (QoQ) (3Q A)	30-10-2018	10:00	EUR	-	-
Euro-Zone Gross Domestic Product s.a. (YoY) (3Q A)	30-10-2018	10:00	EUR	-	-
Euro-Zone Industrial Confidence (OCT)	30-10-2018	10:00	EUR	-	-
Euro-Zone Services Confidence (OCT)	30-10-2018	10:00	EUR	-	-
German Consumer Price Index (MoM) (OCT P)	30-10-2018	13:00	EUR	-	-
German Consumer Price Index (YoY) (OCT P)	30-10-2018	13:00	EUR	-	-
ECB's Praet Speaks in Frankfurt	30-10-2018	13:30	EUR	-	-
ECB's Lautenschlaeger Speaks in Bahamas	30-10-2018	14:10	EUR	-	-
French Gross Domestic Product (QoQ) (3Q A)	30-10-2018	6:30	EUR	-	-
French Gross Domestic Product (YoY) (3Q A)	30-10-2018	6:30	EUR	-	-
German Unemployment Change (000's) (OCT)	30-10-2018	8:55	EUR	-	(23k)
German Unemployment Claims Rate s.a. (OCT)	30-10-2018	8:55	EUR	-	-
Italian Gross Domestic Product w.d.a. (QoQ) (3Q P)	30-10-2018	9:00	EUR	-	-
Italian Gross Domestic Product w.d.a. (YoY) (3Q P)	30-10-2018	9:00	EUR	-	-
CBI Reported Sales (OCT)	30-10-2018	11:00	GBP	-	-
CBI Total Dist. Reported Sales (OCT)	30-10-2018	11:00	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	30-10-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	30-10-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	30-10-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	30-10-2018	1:10	JPY	-	-
Industrial Production (MoM) (SEP P)	30-10-2018	23:50	JPY	-	-
Industrial Production (YoY) (SEP P)	30-10-2018	23:50	JPY	-	-



Gross Domestic Product NSA (YoY) (3Q P)	30-10-2018	14:00	MXN	-	-
Gross Domestic Product SA (QoQ) (3Q P)	30-10-2018	14:00	MXN	-	-
Building Permits (MoM) (SEP)	30-10-2018	21:45	NZD	-	-
S&P CoreLogic CS 20-City (MoM) SA (AUG)	30-10-2018	13:00	USD	-	-
S&P/Case-Shiller 20-City Index n.s.a (AUG)	30-10-2018	13:00	USD	-	-
S&P/Case-Shiller Composite-20 (YoY) (AUG)	30-10-2018	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (AUG)	30-10-2018	13:00	USD	-	-
S&P/Case-Shiller US Home Price Index (YoY) (AUG)	30-10-2018	13:00	USD	-	-
Conf. Board Expectations (OCT)	30-10-2018	14:00	USD	-	-
Conf. Board Present Situation (OCT)	30-10-2018	14:00	USD	-	-
Consumer Confidence Index (OCT)	30-10-2018	14:00	USD	-	-
U.S. to Sell 4-Week Bills	30-10-2018	15:30	USD	-	-
U.S. to Sell 8-Week Bills	30-10-2018	15:30	USD	-	-

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