



31 Jul.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,302	(0.2) %	10.7 %
BSE SENSEX	37,494	0.4 %	12.5 %
CNX BANK	27,796	(0.2) %	14.3 %
CNX MIDCAP	18,870	0.4 %	(1.2) %
CNX SMALLCAP	7,461	0.3 %	(5.9) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,307	(0.6) %	1.9 %
S&P 500	2,803	(0.6) %	4.0 %
FTSE 100	7,701	(0.0) %	0.7 %
HANG SENG	28,733	(0.3) %	(5.8) %
NIKKEI	22,545	(0.7) %	(4.1) %
SHANGHAI COMPOSITE	2,869	(0.2) %	(14.3) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	68.68	0.0 %	7.9 %
EUR/USD	1.17	0.5 %	(2.5) %
GBP/USD	1.31	0.1 %	(2.9) %
USD/JPY	111.09	0.1 %	(1.4) %
USD/AUD	1.35	(0.5) %	5.4 %
USD/SGD	1.36	(0.0) %	2.0 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	2.1 %	16.2 %
Gold(INR/10g)	29,773	0.2 %	1.4 %
Gold Comex(USD/oz)	1,230	(0.2) %	(6.0) %
SILVER(INR/1Kg)	37,969	0.5 %	(1.6) %
Aluminium(USD/MT)	2,054	(0.0) %	(9.0) %
Copper(USD/MT)	6,185	(1.1) %	(13.9) %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.0	0.0 %	0.5 %

**Global Economy:** Eurozone economic sentiment index dropped to 112.1 in July from 112.3 in the previous month, survey data from European Commission showed Monday. The industrial confidence index decreased to 5.8 from 6.9 in the previous month. Meanwhile, the services sentiment index rose to 15.3 from 14.4 a month ago. The consumer confidence index held steady at -0.6 in July and in line with flash estimate. At the same time, the confidence index in construction fell to 5.4 from 5.6 in June. UK mortgage approvals rose to 65,619 in June from 64,684 in May, figures from Bank of England showed Monday. This was the highest level since January, when approvals totaled 67,156. Japan retail sales climbed 1.5 percent month-on-month in June, reversing a 1.7% fall in May, data from the Ministry of Economy, Trade and Industry showed. On a yearly basis, retail sales grew 1.8% in June.

**Global Equities:** European stocks fell as a drop in metal prices weighed on mining companies and investors awaited critical monetary policy decisions this week.

**Indian Economy:** Industry body FICCI has welcomed Prime Minister Narendra Modi's recognition of the contribution of industry and industrialists in national growth and also his strong refusal to accept any ill-treatment to the industrialists just because a few of them have indulged in illegal activities. Along with the assurance to work closely with the industry, the Prime Minister's strong message to the industrialists opting for illegal means to harm the nation and its economy that they will not be spared, will certainly help in removing any negative opinion in the public against industry in general, and will rejuvenate the private sector noted Rashesh Shah, President, FICCI.

**Equity Markets:** Stocks logged modest gains on steady buying in index pivots ICICI Bank, State Bank of India and Reliance Industries. Both the Sensex and the Nifty hit record high on intraday as well as closing basis. The market opened higher and hit fresh intraday high in early trade. Indices sharply pared gains and were trading near flat line in morning trade. Indices bounced back after hitting fresh intraday low in mid-morning trade. Indices firmed up in early afternoon trade and hit fresh intraday high in late trade.

**Corporate News:** InterGlobe Aviation reported a 96.6% tumble in profit at Rs 27.80 crore for June quarter, hurt by adverse impact of foreign exchange, high fuel prices and the competitive fare environment. Aircraft fuel expenses rose 54.4% YoY during the quarter to Rs 2,715.60 crore. Expenditure on investment in logistics, including infrastructure, will touch USD 500 billion, annually, by 2025, said Suresh Prabhu, the Union Minister of Commerce and Industry. He further said that this will create millions of jobs and also do away with the hurdles hampering India's internal and global trade. Reliance Industries could extend recent gains after consolidated net profit rose 4.47% to Rs 9485 crore on 50.58% rise in total income to Rs 130544 crore in Q1 June 2018 over Q1 June 2017. HDFC said its net profit rose 53.74% to Rs 2190 crore on 20.05% increase in total income to Rs 9951.98 crore in Q1 June 2018 over Q1 June 2017. Avenue Supermarts recorded 43% spurt in Q1 net profit to Rs 250 crore. The company's revenues grew 27% to Rs 4,559.4 crore. Tech Mahindra reported 12.4% YoY rise in consolidated profit after tax (PAT) at Rs 898 crore for Q1 June 2018. The profit fell 26% on sequential basis. Revenue for the quarter went up nearly 13% to Rs 8,276 crore.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	81.6	4.9	(32.0)
MF(INR cr)	(198.5)	367.5	474.8

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	37,049	32,694	32,958
F&O(INR cr)	515,736	963,325	868,267

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	13.0	13.3	14.8
NSE VIX	12.6	12.7	13.3

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	27,843	0.8 %	14.4 %	Energy	14,912	1.5 %	12.2 %
IT	14,421	(0.7) %	13.5 %	Pharma	9,116	0.8 %	5.7 %
Metals	3,320	0.7 %	(6.2) %	Finance	11,739	0.4 %	14.4 %
Auto	10,925	0.5 %	(1.2) %	PSU	3,227	4.3 %	13.0 %
FMCG	30,837	0.3 %	16.4 %	Real Estate	268	0.2 %	(9.5) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
General In	377	12.7 %	1.8 %	ACC	1,504	(2.0) %	(2.2) %
Bank of Ba	152	10.3 %	7.2 %	HCL Techno	947	(1.7) %	(3.3) %
Bharat Ele	108	5.2 %	(25.5) %	Infosys	1,351	(1.6) %	18.8 %
Bharti Air	383	5.1 %	(3.0) %	Tata Motor	147	(1.6) %	(22.5) %
ICICI Bank	307	4.8 %	17.4 %	HDFC Bank	2,170	(1.5) %	12.4 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Building Approvals (MoM) (JUN)	31-07-2018	1:30	AUD	-	(0.032)
Building Approvals (YoY) (JUN)	31-07-2018	1:30	AUD	-	0.031
Private Sector Credit (MoM) (JUN)	31-07-2018	1:30	AUD	-	0.002
Private Sector Credit (YoY) (JUN)	31-07-2018	1:30	AUD	-	0.048
AiG Performance of Manufacturing Index (JUL)	31-07-2018	22:30	AUD	-	57.4
CBA Australia PMI Mfg (JUL)	31-07-2018	23:00	AUD	-	55
Gross Domestic Product (MoM) (MAY)	31-07-2018	12:30	CAD	-	0.001
Gross Domestic Product (YoY) (MAY)	31-07-2018	12:30	CAD	-	0.025
Industrial Product Price (MoM) (JUN)	31-07-2018	12:30	CAD	-	0.01
Raw Materials Price Index (MoM) (JUN)	31-07-2018	12:30	CAD	-	0.038
Swiss National Bank Interim Results (30 JUN)	31-07-2018	5:25	CHF	-	-
Swiss National Bank Releases 2Q 2017 Currency Allocation	31-07-2018	5:30	CHF	-	-
Composite PMI (JUL)	31-07-2018	1:00	CNY	-	54.4
Manufacturing PMI (JUL)	31-07-2018	1:00	CNY	-	51.5
Non-manufacturing PMI (JUL)	31-07-2018	1:00	CNY	-	55
Italian Gross Domestic Product w.d.a. (QoQ) (2Q P)	31-07-2018	10:00	EUR	-	0.003
Italian Gross Domestic Product w.d.a. (YoY) (2Q P)	31-07-2018	10:00	EUR	-	0.014
German Retail Sales (MoM) (JUN)	31-07-2018	6:00	EUR	-	(0.021)
German Retail Sales (YoY) (JUN)	31-07-2018	6:00	EUR	-	(0.016)
German Unemployment Change (000's) (JUL)	31-07-2018	7:55	EUR	-	-
German Unemployment Claims Rate s.a. (JUL)	31-07-2018	7:55	EUR	-	0.052
Euro-Zone Consumer Price Index Core (YoY) (JUL A)	31-07-2018	9:00	EUR	-	0.009
Euro-Zone Consumer Price Index Estimate (YoY) (JUL)	31-07-2018	9:00	EUR	-	0.02
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q A)	31-07-2018	9:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q A)	31-07-2018	9:00	EUR	-	0.025
Euro-Zone Unemployment Rate (JUN)	31-07-2018	9:00	EUR	-	0.084
BRC Shop Price Index (YoY) (JUL)	31-07-2018	23:01	GBP	-	(0.005)
Vehicle Production (YoY) (MAY)	31-07-2018	4:00	JPY	-	0.038
Annualized Housing Starts (JUN)	31-07-2018	5:00	TRY	-	-



Construction Orders (YoY) (JUN)	31-07-2018	5:00	JPY	-	(0.187)
Consumer Confidence Index (JUL)	31-07-2018	5:00	JPY	-	43.7
Housing Starts (YoY) (JUN)	31-07-2018	5:00	JPY	-	0.013
GDP NSA (YoY) (2Q P)	31-07-2018	13:00	MXN	-	0.013
GDP SA (QoQ) (2Q P)	31-07-2018	13:00	MXN	-	0.011
ANZ Activity Outlook (JUL)	31-07-2018	1:00	NZD	-	9.4
ANZ Business Confidence (JUL)	31-07-2018	1:00	NZD	-	(39)
QV House Prices (YoY) (JUL)	31-07-2018	17:00	NZD	-	0.057
Average Hourly Earnings (QoQ) (2Q)	31-07-2018	22:45	NZD	-	0.011
Employment Change (QoQ) (2Q)	31-07-2018	22:45	NZD	-	0.006
Employment Change (YoY) (2Q)	31-07-2018	22:45	NZD	-	0.031
Labor Cost Private Sector (QoQ) (2Q)	31-07-2018	22:45	NZD	-	0.003
Participation Rate (2Q)	31-07-2018	22:45	NZD	-	0.708
Private Wages ex Overtime (QoQ) (2Q)	31-07-2018	22:45	NZD	-	0.003
Unemployment Rate (2Q)	31-07-2018	22:45	NZD	-	0.044
Employment Cost Index (2Q)	31-07-2018	12:30	USD	-	0.008
PCE Core (MoM) (JUN)	31-07-2018	12:30	USD	-	0.002
PCE Core (YoY) (JUN)	31-07-2018	12:30	USD	-	0.02
PCE Deflator (MoM) (JUN)	31-07-2018	12:30	USD	-	0.002
PCE Deflator (YoY) (JUN)	31-07-2018	12:30	USD	-	0.023
Personal Income (JUN)	31-07-2018	12:30	USD	-	0.004
Personal Spending (JUN)	31-07-2018	12:30	USD	-	0.002
Real Personal Spending (JUN)	31-07-2018	12:30	USD	-	0
S&P CoreLogic CS 20-City (MoM) SA (MAY)	31-07-2018	13:00	USD	-	0.002
S&P/Case-Shiller 20-City Index n.s.a (MAY)	31-07-2018	13:00	USD	-	210.17
S&P/Case-Shiller Composite-20 (YoY) (MAY)	31-07-2018	13:00	USD	-	0.066
S&P/Case-Shiller US Home Price Index (MAY)	31-07-2018	13:00	USD	-	200.86
S&P/Case-Shiller US Home Price Index (YoY) (MAY)	31-07-2018	13:00	USD	-	0.0641
Chicago Purchasing Manager (JUL)	31-07-2018	13:45	USD	-	64.1
Conf. Board Expectations (JUL)	31-07-2018	14:00	USD	-	103.2
Conf. Board Present Situation (JUL)	31-07-2018	14:00	USD	-	161.1
Consumer Confidence Index (JUL)	31-07-2018	14:00	USD	-	126.4
U.S. to Sell 4-Week Bills	31-07-2018	15:30	USD	-	-

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