



31 Aug.2018

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	11,676	(0.0) %	14.3 %
BSE SENSEX	38,690	(0.1) %	16.4 %
CNX BANK	27,998	(0.4) %	15.1 %
CNX MIDCAP	19,858	0.0 %	4.0 %
CNX SMALLCAP	7,655	0.2 %	(3.5) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,987	(0.5) %	4.7 %
S&P 500	2,901	(0.4) %	7.6 %
FTSE 100	7,516	(0.6) %	(1.7) %
HANG SENG	28,164	(0.9) %	(7.7) %
NIKKEI	22,870	0.1 %	(2.7) %
SHANGHAI COMPOSITE	2,738	(1.1) %	(18.2) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	70.73	0.9 %	11.1 %
EUR/USD	1.17	(0.3) %	(2.9) %
GBP/USD	1.30	1.1 %	(3.7) %
USD/JPY	110.99	(0.3) %	(1.5) %
USD/AUD	1.38	1.4 %	7.9 %
USD/SGD	1.37	0.2 %	2.4 %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	70	1.4 %	15.1 %
Gold(INR/10g)	30,099	0.2 %	2.5 %
Gold Comex(USD/oz)	1,210	(0.1) %	(7.6) %
SILVER(INR/1Kg)	37,004	(0.1) %	(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:** Eurozone economic sentiment index dropped to 111.6 in August from 112.1 in July, survey results from European Commission showed. The expected score was 111.9. The decrease in the Eurozone sentiment indicator resulted from a marked deterioration of confidence among consumers and a milder decrease in the services sector, which were only partly offset by increases in the retail trade and construction sectors. The industrial confidence index came in at 5.5 in August, in line with forecast, but down from 5.8 a month ago. Likewise, the services sentiment index slid to 14.7 from 15.3 a month ago. The consumer confidence index declined to -1.9 from -0.5 in the previous month. The score came in line with flash estimate. Germany's unemployment fell by 8,000 in August from the previous month, in line with expectations, the Federal Labor Agency reportedly said Thursday. The jobless rate remained stable at 5.2% in August, as expected. This was the lowest since German reunification in 1990.

**Global Equities:** US President Donald Trump has signed proclamations permitting targeted relief from steel and aluminum quotas from some countries, the US Commerce Department said.

**Indian Economy:** India and United States are partners in the digital arena and share a relationship that is mutually beneficial and enriching as exemplified by the large number of Indian companies working in the US, said Minister Prasad while addressing a Seminar organized by the US - India Strategic Partnership Forum and the Consulate General of India (CGI), San Francisco. The Minister informed the participants about the business and investment opportunities in India and invited them to develop deeper partnerships with India to take advantage of the unique growth opportunities in India. He said that leveraging the talent rich Indian environment offered US firms sustainable growth potential and continued competitiveness.

**Equity Markets:** Local markets fell marginally on Thursday amid mostly negative cues from Asian markets. Trading was volatile as traders rolled over positions in the F&O segment from the August 2018 series to September 2018 series. Focus has shifted on macros now after recent spurt in local indices. Soaring oil prices and a tumble in Indian Rupee are also likely to weigh on the sentiments in near term.

**Corporate News:** Larsen & Toubro has delivered the Offshore Patrol Vessel ICGS Vijaya (OPV-2) to the Indian Coast Guard on 30 August 2018, ahead of schedule. The 2,160-ton vessel is second in the series of seven OPVs being designed and constructed by L&T under a March 2015 Ministry of Defence contract. The Bombay Stock Exchange will introduce futures and options (F&O) contracts on Bharat-22 index from September 3. Bharat-22 index, comprising the shares of 22 companies, is a blend of shares of key central public sector enterprises, public sector banks and blue chip private companies. Continued firmness in global crude oil prices could weigh on the domestic Oil Marketing Companies (OMCs). Domestic two wheeler producers are likely to stay under pressure on the impending six-fold hike in insurance premium for third party covers.



## 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)	43,943	36,374	33,665
F&O(INR cr)	1,931,286	1,008,379	896,501

## 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	28,103	(0.4) %	15.5 %	Energy	15,961	(0.6) %	20.1 %
IT	15,530	0.0 %	22.2 %	Pharma	10,121	1.1 %	17.4 %
Metals	3,665	0.9 %	3.6 %	Finance	11,743	(0.5) %	14.4 %
Auto	11,008	(0.4) %	(0.5) %	PSU	3,295	0.3 %	15.4 %
FMCG	32,844	1.3 %	23.9 %	Real Estate	276	0.6 %	(6.9) %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bosch	22,005	9.6 %	18.8 %	Interglobe	941	(2.7) %	(29.2) %
Aditya Bir	143	4.4 %	(5.6) %	Eicher Mot	27,602	(2.1) %	(2.4) %
Sun Pharma	640	3.0 %	26.0 %	Siemens	1,006	(2.1) %	(8.7) %
Petronet L	240	2.9 %	4.0 %	Bajaj Fin.	2,927	(2.0) %	60.9 %
Tata Steel	608	2.4 %	5.1 %	H P C L	253	(1.8) %	(26.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Private Sector Credit (MoM) (JUL)	31-08-2018	1:30	AUD	-	0.003
Private Sector Credit (YoY) (JUL)	31-08-2018	1:30	AUD	-	0.045
Industrial Product Price (MoM) (JUL)	31-08-2018	12:30	CAD	-	0.005
Raw Materials Price Index (MoM) (JUL)	31-08-2018	12:30	CAD	-	0.005
Composite PMI (AUG)	31-08-2018	1:00	CNY	-	53.6
Manufacturing PMI (AUG)	31-08-2018	1:00	CNY	-	51.2
Non-manufacturing PMI (AUG)	31-08-2018	1:00	CNY	-	54
Italian Gross Domestic Product w.d.a. (QoQ) (2Q F)	31-08-2018	10:00	EUR	-	0.002
Italian Gross Domestic Product w.d.a. (YoY) (2Q F)	31-08-2018	10:00	EUR	-	0.011
ECB Board Member Luis Guindos Speaks in Asturias, Spain	31-08-2018	17:00	EUR	-	-
Euro-Zone Consumer Price Index Core (YoY) (AUG A)	31-08-2018	9:00	EUR	-	-
Euro-Zone Consumer Price Index Estimate (YoY) (AUG)	31-08-2018	9:00	EUR	-	-
Euro-Zone Unemployment Rate (JUL)	31-08-2018	9:00	EUR	-	0.083
BOJ Outright Bond Purchase 1~3 Years	31-08-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	31-08-2018	1:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	31-08-2018	1:10	JPY	-	-
Vehicle Production (YoY) (JUN)	31-08-2018	4:00	JPY	-	0.046
Annualized Housing Starts (JUL)	31-08-2018	5:00	JPY	-	-
Construction Orders (YoY) (JUL)	31-08-2018	5:00	JPY	-	(0.065)
Housing Starts (YoY) (JUL)	31-08-2018	5:00	JPY	-	(0.071)
Chicago Purchasing Manager (AUG)	31-08-2018	13:45	USD	-	65.5
U. of Mich. 1 Yr Inflation (AUG F)	31-08-2018	14:00	USD	-	-
U. of Mich. 5-10 Yr Inflation (AUG F)	31-08-2018	14:00	USD	-	-
U. of Mich. Current Conditions (AUG F)	31-08-2018	14:00	USD	-	-
U. of Mich. Expectations (AUG F)	31-08-2018	14:00	USD	-	-
U. of Mich. Sentiment (AUG F)	31-08-2018	14:00	USD	-	-
Baker Hughes U.S. Rig Count (AUG 31)	31-08-2018	17:00	USD	-	-

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