

RELIANCE

MUTUAL
FUND

Markets for You

20 Aug 2018

Indices Performance

Global Indices	17-Aug	Prev_Day	Abs. Change	% Change [#]
Dow Jones	25,669	25,559	111	0.43
Nasdaq	7,816	7,807	10	0.13
FTSE	7,559	7,556	2	0.03
Nikkei	22,270	22,192	78	0.35
Hang Seng	27,213	27,100	113	0.42
Indian Indices	17-Aug	Prev_Day	Abs. Change	% Change [#]
S&P BSE Sensex	37,948	37,664	284	0.75
Nifty 50	11,471	11,385	86	0.75
Nifty 100	11,747	11,648	99	0.85
Nifty Bank	28,129	27,827	302	1.09
SGX Nifty	11,485	11,417	69	0.60
S&P BSE Power	1,977	1,964	14	0.70
S&P BSE Small Cap	16,866	16,710	157	0.94
S&P BSE HC	15,014	14,828	186	1.25

P/E Dividend Yield

Date	Sensex		Nifty	
	P/E	Div. Yield	P/E	Div. Yield
17-Aug	24.69	1.16	28.11	1.17
Month Ago	23.08	1.20	27.35	1.19
Year Ago	23.78	1.23	25.30	0.97

Nifty 50 Top 3 Gainers

Company	17-Aug	Prev_Day	% Change [#]
Yes Bank	393	378	3.90
Lupin	881	850	3.71
Aurobindo Pharma	656	635	3.24

Nifty 50 Top 3 Losers

Company	17-Aug	Prev_Day	% Change [#]
GAIL	388	394	-1.55
Hero Moto	3242	3283	-1.23
Eicher Motors	28476	28804	-1.14

Advance Decline Ratio

	BSE	NSE
Advances	1629	1113
Declines	1076	667
Unchanged	157	99

Institutional Flows (Equity)

Description (Cr)	Inflow/Outflow	YTD
FII Flows*	-371	-1372
MF Flows**	15	72753

*16th Aug 2018; **7th Aug 2018

Economic Indicator

YoY(%)	Current	Quarter Ago	Year Ago
CPI	4.17%	4.58%	2.36%
	(Jul-18)	(Apr-18)	(Jul-17)
IIP	7.00%	5.30%	-0.30%
	(Jun-18)	(Mar-18)	(Jun-17)
GDP	7.70%	7.00%	6.10%
	(Mar-18)	(Dec-17)	(Mar-17)

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

Global Indices

• Asian markets ended on a mixed note because of the Turkish currency rebounding and optimism over U.S.-China trade talks on the one hand and a widening vaccine scandal in China on the other. U.S. and China have agreed to meet at the end of Aug to discuss trade issues, just before the new set of levies by both nations come into effect. Chinese markets were hit as healthcare stocks declined over a vaccine scandal. Today (as of Aug 20), Asian markets opened mixed as investors remained focused towards U.S. and China tariff talks. While Nikkei was trading down 0.22%, Hang Seng was up 1.08% (as at 8 a.m. IST).

• As per the last close, European markets closed almost lower as investors remained cautious amid Turkey's ongoing currency crisis. However, reports that U.S. and China are set to resume trade negotiations improved market sentiment, thereby restricting the losses.

• As per the last close, U.S markets closed almost higher amid reports that U.S. and China negotiators are planning for talks to try to end the trade impasse.

Indian Equity Market

• Indian equity markets closed in the green on positive global cues as U.S. and China agreed to hold talks later in Aug, just before the new set of levies by both nations come into effect. Investor sentiment was boosted also by rebound in Turkish currency lira.

• Key benchmark indices S&P BSE Sensex and Nifty 50 gained 0.75% each to close at 37,947.88 and 11,470.75, respectively. S&P BSE Mid-Cap and S&P BSE Small Cap increased 0.88% and 0.94%, respectively.

• The overall market breadth on BSE was strong with 1629 scrips advancing and 1076 scrips declining. A total of 157 scrips remained unchanged.

• On the BSE sectoral front S&P BSE Basic Materials stood as the major gainer, up 2.04% followed by S&P BSE Fast Moving Consumer Goods that grew 1.79%. S&P BSE Metal and S&P BSE Bankex grew 1.71% and 1.27%. The only loser was S&P BSE Oil and Gas, falling 0.15%.

Domestic News

• The government has allowed import of petcoke for usage as feedstock in few industries. Cement companies account for around three-fourths of the country's petcoke requirement and will benefit from the announcement. The Supreme Court had banned the use of the fuel in and around New Delhi in 2017 and since then there has been no clear policy stance on the issue.

• The number of students going abroad to study from India is going up steadily every year while fewer students are coming from other countries to study here, according to a Reserve Bank of India (RBI) report. The report said while spending on tuition and hostel fees by Indian students studying overseas has gone up 44% from \$1.9 billion in 2013-14 to \$2.8 billion in 2017-18, expenses of foreign students in India has come down from \$557 million in 2015-16 to \$479 million in 2017-18.

• The draft proposing red-labelling of packaged food products with high levels of fat, sugar and salt has been put on hold by the government. Food safety regulator FSSAI in Apr had released the draft of Food Safety and Standards (Labelling and Display) Regulations 2018 under which it was proposed that red-label marking will be made mandatory on such packaged food products. The expert panel will be headed by the former director of National Institute of Nutrition and its current director.

• In order to arrange an extra 160,000 hospital beds required under Ayushman Bharat-National Health Protection Mission (AB-NHPM), popularly called Modicare, the government may look at the public-private partnership (PPP) model. Modicare aims to provide free health insurance of Rs. 5 lakh per family to almost 40% of the population, which is more than 100 million poor and vulnerable families based on the socio-economic caste census. Around 33% of the people covered will not have previous health insurance coverage.

FII Derivative Trade Statistics		17-Aug		
(Rs Cr)	Buy	Sell	Open Int.	
Index Futures	2381.37	2813.90	28720.14	
Index Options	160706.20	158172.20	64602.56	
Stock Futures	12107.33	12127.98	86192.75	
Stock Options	8693.24	8866.68	10281.65	
Total	183888.14	181980.76	189797.10	

Derivative Statistics- Nifty Options			
	17-Aug	Prev_Day	Change
Put Call Ratio (OI)	1.66	1.60	0.06
Put Call Ratio(Vol)	1.15	1.04	0.11

Debt Watch				
	17-Aug	Wk. Ago	Mth. Ago	Year Ago
Call Rate	Closed	6.37%	6.12%	5.84%
CBLO	Closed	6.40%	6.23%	5.84%
Repo	Closed	6.50%	6.25%	6.00%
Reverse Repo	Closed	6.25%	6.00%	5.75%
91 Day T-Bill	Closed	6.67%	6.53%	6.13%
364 Day T-Bill	Closed	7.26%	7.19%	6.24%
10 Year Gilt	Closed	7.75%	7.75%	6.53%
G-Sec Vol. (Rs.Cr)	Closed	36452	29694	33146
FBI L MIBOR	Closed	6.55%	6.30%	6.00%
3 Month CP Rate	Closed	7.50%	7.65%	6.55%
5 Year Corp Bond	Closed	8.61%	8.71%	7.40%
1 Month CD Rate	Closed	6.62%	6.50%	6.09%
3 Month CD Rate	Closed	7.18%	7.05%	6.19%
1 Year CD Rate	Closed	8.02%	7.98%	6.48%

Currency Market			
Currency	17-Aug	Prev_Day	Change
USD/INR	Closed	70.23	N.A.
GBP/INR	Closed	89.37	N.A.
EURO/INR	Closed	79.97	N.A.
JPY/INR	Closed	0.63	N.A.

Commodity Prices				
Commodity	17-Aug	Wk Ago	Mth. Ago	Year Ago
NYMEX Crude(\$/bl)	65.88	67.56	67.98	47.02
Brent Crude(\$/bl)	69.33	70.19	70.31	50.26
Gold(\$/oz)	1184	1211	1227	1288
Gold(Rs./10 gm)	29361	29477	30044	28989

Source: Thomson Reuters Eikon

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Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.

Derivatives Market

- Nifty August 2018 Futures closed at 11,488.45, a premium of 17.70 points, above the spot closing of 11,470.75. The turnover on NSE's Futures and Options segment decreased to Rs. 17,76,483.56 on Aug 16 compared with Rs. 5,52,873.53 on Aug 17.
- The Put-Call ratio stood at 0.92 against previous session's close of 0.84.
- The Nifty Put-Call ratio stood at 1.66 compared with the previous session's close of 1.60.
- India VIX decreased 3.48% to 13.1700 from 13.6450 in the previous trading session.
- Open interest on Nifty Futures stood at 31.87 million as against the previous session's close at 30.72 million.

Indian Debt Market

- The domestic debt market remained closed on account of Parsi New Year.

Currency Market Update

- The domestic currency market remained closed on account of Parsi New Year.
- The euro rose against the greenback on reports that China and the United States will hold a new round of trade talks later this month which make market participants optimistic of ease in trade tensions between the two countries. Euro was last seen trading at \$1.1405, up 0.26% against the previous close of \$1.1375.

Commodity Market Update

- Gold prices traded higher following weakness in greenback on reports that White House economic advisor has confirmed that U.S. and China officials will meet later in Aug 2018 to resume trade talks.
- Brent crude traded higher amid reports of resuming of talks between the U.S. and China in Aug 2018.

International News

- Data from the Conference Board showed that the leading economic index in U.S. grew 0.6% in Jul 2018 following a 0.5% increase in Jun 2018. The coincident economic index also grew 0.2% in Jul 2018 after rising by 0.3% in Jun 2018. The lagging economic index fell 0.2% in Jul 2018 after it rose 0.2% in the previous month.
- Eurostat data showed eurozone inflation increased for the third consecutive month in Jul 2018, in tandem with initial estimates. The data touched its highest level since late 2012. The harmonized index of consumer prices increased 2.1% YoY in Jul, after climbing 2% in Jun 2018.



Thank you for
your time.