

MONTHLY **NEWS** LETTER

JUNE - 2018



MARKET MANTRA

Indira Securities Pvt. Ltd.

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FACILITY - INSPIRE

MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	35227.26	35160.36	0.19%
NIFTY	10696.2	10739.35	-0.40%
BANK NIFTY	26692.80	25531.60	4.55%



MARKET COMMENTARY

- The outcome of the Reserve Bank of India's (RBI) monetary policy meeting and macroeconomic data will dictate trend on the bourses next week. The RBI's Monetary Policy Committee (MPC) will meet on 4-6 June 2018 for the second bi-monthly monetary policy statement for 2018-2019. The resolution of the MPC will be unveiled at 14:30 pm on 6 June 2018.
- RBI maintained status quo in its last monetary policy meeting on 5 April 2018. On the basis of an assessment of the current and evolving macroeconomic situation, RBI decided to keep the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 6%. Consequently, the reverse repo rate under the LAF remains at 5.75%, and the marginal standing facility (MSF) rate and the Bank Rate at 6.25%.
- Markit Economics will unveil the result of a monthly survey on the performance of India's services sector in May 2018 on Tuesday, 5 June 2018. The Nikkei Services PMI in India rose to 51.4 in April 2018 from 50.3 in the previous month.
- Trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and crude oil price movement will also remain on investors' radar.
- On the global front, United States ISM non manufacturing PMI for May 2018 will be unveiled on Tuesday, 5 June 2018. The ISM non-manufacturing PMI index for the United States fell to 56.8 in April of 2018 from 58.8 in March.
- United States Balance of Trade data for April 2018 will be disclosed on Wednesday, 6 June 2018. The US trade deficit narrowed to \$49 billion in March 2018 from a slightly upwardly revised \$57.7 billion in the previous month.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	15852.51	16798.94	-5.63%
SMALCAP	16978.96	18178.03	-6.60%
METAL	13506	14276.91	-5.40%
OIL&GAS	14342.3	14429.52	-0.60%
AUTO	24635.29	25833.75	-4.64%
TECK	6915.09	7097.37	-2.57%
BANKEX	29780.74	28651.87	3.94%
IT	13326.16	13567.69	-1.78%
FMCG	11216.01	11305.73	-0.79%
HC	12945.45	14153.59	-8.54%
PSU	7799.55	7858.02	-0.74%
CD	20574.51	22379.9	-8.07%
POWER	2089.12	2238.15	-6.66%
CG	18694.89	19543.29	-4.34%
REALITY	2210.67	2430.23	-9.03%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	24636.12	24099.05	2.23%
NASDAQ	7546.42	7130.70	5.83%
FTSE	7701.77	7520.36	2.41%
NIKKEI	22171.35	22460.50	-1.29%
HANGSENG	30492.91	30627.00	-0.44%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1297.9	1310.40	-0.95%
SILVER	16.42	16.335	0.52%
CRUDE	65.71	67.36	-2.45%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE	% CHANGE
INR-1 USD	67.1840	66.7801	0.60%
INR-1 EURO	78.4104	80.7438	-2.89%
INR-100 YEN	61.5600	61.0800	0.79%
INR-1 POUND	89.1397	92.8911	-4.04%



NIFTY THIS MONTH = -43

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	10970	10459
2	11205	10182
3	11482	9948

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	9807
50 Days	8813
100 Days	7218
200 Days	5039

TOP GANERS

SCRIPT	CMP	% CHANGE
Just Dial	571.95	49.71
PC Jeweller L	156.45	28.82
Firstsource Solution	75.1	18.08
Lakshmi Vilas Ba	107.2	15.64
Mahindra Lifespace D	537.9	14.74

TOP LOSERS

SCRIPT	CMP	% CHANGE
Tata Consultancy	1732.25	-50.26
Strides Shasun L	385.6	-36.21
Avanti Feeds Lim	1543.35	-34.78
Rain Industries	223	-30.69
CG Power and Indust	59.1	-27.53

STOCK AT 52 Wk HIGH

SCRIPT	CMP
Godrej Consumer	1,157.20
Britannia Ind.	5,806.90
Dabur India	386.65
Torrent Pharma	1,453.75
Varun Beverages Ltd.	770.35

STOCK AT 52 Wk LOW

SCRIPT	CMP
Aurobindo Phar.	534.95
Bharat Electronics	111.40
MRPL	91.50
Motilal Oswal	904.70
Apollo Hospitals	928.10

FII & DII ACTIVITY- APRIL 2018

	AMOUNT
FII	-12359.71
DII	+15054.48

MAJOR EVENTS IN JUNE 2018

TIME	CURRENCY	ECONOMIC DATA	FORECAST	PREVIOUS
		<u>Friday, June 1, 2018</u>		
7:15	CNY	Caixin Manufacturing PMI (May)	51.3	51.1
14:00	GBP	Manufacturing PMI (May)	53.5	53.9
18:00	USD	Nonfarm Payrolls (May)	189K	159K
18:00	USD	Unemployment Rate (May)	3.90%	3.90%
19:30	USD	ISM Manufacturing PMI (May)	58.2	57.3
7:15	CNY	Caixin Manufacturing PMI (May)	51.3	51.1
		<u>Monday, June 4, 2018</u>		
7:00	AUD	Retail Sales (MoM) (Apr)	0.20%	0.00%
14:00	GBP	Construction PMI (May)	52	52.5
		<u>Tuesday, June 5, 2018</u>		
10:00	AUD	RBA Interest Rate Decision (Jun)	1.50%	1.50%
10:00	AUD	RBA Rate Statement		
14:00	GBP	Services PMI (May)	53	52.8
19:30	USD	ISM Non-Manufacturing PMI (May)	57.5	56.8
19:30	USD	JOLTs Job Openings (Apr)	6.101M	6.550M
		<u>Wednesday, June 6, 2018</u>		
7:00	AUD	GDP (QoQ) (Q1)	0.80%	0.40%
14:30	INR	Interest Rate Decision	6.00%	6.00%
20:00	USD	Crude Oil Inventories		
		<u>Friday, June 8, 2018</u>		
5:20	JPY	GDP (QoQ) (Q1)	0.20%	-0.20%
14:00	GBP	Manufacturing Production (MoM) (Apr)	-0.20%	-0.10%
		<u>Monday, June 11, 2018</u>		
All Day		Australia - Queen's Birthday		All Day
14:00	GBP	Manufacturing Production (MoM) (Apr)	-0.10%	14:00

TIME	CURRENCY	ECONOMIC DATA	FORECAST	PREVIOUS
		<u>Tuesday, June 12, 2018</u>		
14:00	GBP	Average Earnings Index +Bonus (Apr)	2.60%	2.60%
14:00	GBP	Claimant Count Change (May)	7.8K	31.2K
18:00	USD	Core CPI (MoM) (May)	0.20%	0.10%
		<u>Wednesday, June 13, 2018</u>		
14:00	GBP	Average Earnings Index +Bonus (Apr)	2.60%	2.60%
14:00	GBP	Claimant Count Change (May)	7.8K	31.2K
18:00	USD	Core CPI (MoM) (May)	0.20%	0.10%
		<u>Thursday, June 14, 2018</u>		
7:00	AUD	Employment Change (May)	20.0K	22.6K
7:30	CNY	Industrial Production (YoY) (May)	6.30%	7.00%
14:00	GBP	Retail Sales (MoM) (May)	0.70%	1.60%
18:00	USD	Core Retail Sales (MoM) (May)	0.40%	0.30%
18:00	USD	Retail Sales (MoM) (May)	0.40%	0.20%
		<u>Monday, June 18, 2018</u>		
All Day		China - Dragon Boat Festival		All Day
		<u>Tuesday, June 19, 2018</u>		
18:00	USD	Building Permits (May)	1.350M	1.364M
		<u>Wednesday, June 20, 2018</u>		
19:30	USD	Existing Home Sales (May)	5.57M	5.46M
		<u>Thursday, June 21, 2018</u>		
16:30	GBP	BoE Interest Rate Decision (Jun)	0.50%	0.50%
18:00	USD	Philadelphia Fed Manufacturing Index (Jun)	21	34.4

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