

MONTHLY **NEWS** LETTER

SEPTEMBER -
2018



MARKET MANTRA

Indira Securities Pvt. Ltd.

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- **EQUITY BROKING NSE& BSE**
- **DEPOSITORY SERVICE**
- **DEPOSITORY SERVICES**
- **COMMODITIES NCDEX & MCX**
- **DERIVATIVES NSE, BSE & FOREX**
- **CURRENCY DERIVATIVES NSE, BSE, MCX**
- **INSTITUTIONAL BROKING**
- **PORTFOLIO MANAGEMENT SERVICES**
- **E-BROKING**
- **MUTUAL FUND INVESTMENT**
- **ONLINE IPO BIDDING**
- **INSURANCE ADVISORY**
- **INSURANCE ADVISORY**
- **EDUCATING THROUGH CLASSROOM**

FACILITY - INSPIRE

MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	38645.07	37606.58	2.76%
NIFTY	11680.50	11356.5	2.85%
BANK NIFTY	28216.00	27764.15	1.63%

MARKET COMMENTARY

- Progress of monsoon will be watched. The India Meteorological Department (IMD) in its special daily weather report on 30 August 2018 said that for the country as a whole, cumulative rainfall during southwest monsoon from 1 June 2018 to 30 August 2018 has been 6% below the Long Period Average (LPA). The June-September southwest monsoon is critical for the country's agriculture because a considerable part of the country's farmland is dependent on the rains for irrigation.
- On the global front, the Caixin China General Manufacturing PMI for August 2018 will be unveiled on 3 September 2018. The Caixin China General Manufacturing PMI fell to 50.8 in July 2018 from 51 in June 2018.
- Domestic and global macroeconomic data will dictate trend on the bourses next week. Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for August 2018 starting from 1 September 2018.
- India's infrastructure output data for July 2018 will be declared after market hours on Friday, 31 August 2018. India's infrastructure output rose 6.7% year-on-year in June 2018, following an upwardly revised 4.3% increase in May
- On the domestic macro front, the government will announce data on second quarter gross domestic product (GDP) after market hours on Friday, 31 August 2018. The Indian economy expanded 7.7% year-on-year in the first three months of 2018, higher than a downwardly revised 7% in the previous quarter.
- Trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and



BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	16881.33	16013.44	5.42%
SMALCAP	17193.2	16584.16	3.67%
METAL	13821.31	12659.62	9.18%
OIL&GAS	15079.04	15023.57	0.37%
AUTO	24716.48	24496.98	0.90%
TECK	7817.25	7383.64	5.87%
BANKEX	31741.91	31005.96	2.37%
IT	15548.52	14527.23	7.03%
FMCG	12771.69	12012.67	6.32%
HC	15945.17	14205.73	12.24%
PSU	7907.6	7688.09	2.86%
CD	21696.4	20902.46	3.80%
POWER	2140.72	1975.25	8.38%
CG	18996.76	18295.56	3.83%
REALITY	2141.43	2094.86	2.22%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	25964.8	25415.2	2.16%
NASDAQ	8109.54	7671.79	5.71%
FTSE	7432.42	7748.76	-4.08%
NIKKEI	22856	22649	0.91%
HANGSENG	27888.6	28522	-2.22%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1206.9	1221.9	-1.23%
SILVER	14.43	15.515	-6.99%
CRUDE	69.88	68.41	2.15%

CURRENCY	CLOSE	PRV. CLOSE
INR-1 USD	70.9255	68.5650
INR-1 EURO	82.8391	80.0060
INR-100 YEN	63.9100	61.1900
INR-1 POUND	92.3530	89.8980



NIFTY THIS MONTH = +364

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	12374	10852
2	11870	10347
3	11613	10090

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10139
50 Days	8977
100 Days	7343
200 Days	5143

TOP GANERS

SCRIPT	CMP	% CHANGE
Kwality	19.95	38.25
Adani Transmission L	227.9	36.79
Intellect Design	269.85	33.66
HDIL	32.75	32.59
Welspun Corp	166.6	32.54

TOP LOSERS

SCRIPT	CMP	% CHANGE
IL&FS Transportation	31.4	-26.2
Vakrangee	38.7	-23.67
JaiprakashAssociates	11.93	-19.83
Mahindra Lifespace D	459.85	-14.86
Jet Airways	282.2	-14.79

STOCK AT 52 Wk HIGH

SCRIPT	CMP
TCS	2,078.20
ITC Ltd.	319.15
Infosys	1,440.00
Sun Pharma	652.20
Godrej Consumer	1,447.20

STOCK AT 52 Wk LOW

SCRIPT	CMP
HPCL	254.05
Vardhman Textiles	1,104.35
Cochin Shipyard	422.95
eClerx Services Ltd	1,069.00
DB Corp	223.20

FII & DII ACTIVITY- AUGUST 2018

	AMOUNT
FII	-2228
DII	+2822

<i>DATE</i>	<i>TIME</i>	<i>CURRENCY</i>	<i>ECONOMIC DATA</i>	<i>FORECAST</i>	<i>PREVIOUS</i>
MonSep 3	11:10am	JPY	BOJ Gov Kuroda Speaks		
	2:00pm	GBP	Manufacturing PMI	53.9	54
	10:45pm	EUR	German Buba President Weidmann Speaks		
TueSep 4	2:00pm	GBP	Construction PMI	54.9	55.8
	5:45pm	GBP	Inflation Report Hearings		
	7:30pm	USD	ISM Manufacturing PMI	57.6	58.1
WedSep 5	2:00pm	GBP	Services PMI	53.9	53.5
ThuSep 6	5:45pm	USD	ADP Non-Farm Employment Change	188K	219K
	7:30pm	USD	ISM Non-Manufacturing PMI	57	55.7
		USD	FOMC Member Williams Speaks		
	8:30pm	USD	Crude Oil Inventories		-2.6M
FriSep 7	5:30am	JPY	Average Cash Earnings y/y	2.40%	3.30%
	Tentative	CNY	Trade Balance		177B
	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.30%
		USD	Non-Farm Employment Change	191K	157K
		USD	Unemployment Rate	3.90%	3.90%
SatSep 8					
SunSep 9					
MonSep 10	7:00am	CNY	CPI y/y		
	2:00pm	GBP	GDP m/m		
		GBP	Manufacturing Production m/m		
	Tentative	All	OPEC-JMMC Meetings		
TueSep 11	2:00pm	GBP	Goods Trade Balance		
WedSep 12	2:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Claimant Count Change		
		GBP	Unemployment Rate		
	6:00pm	USD	PPI m/m		
		USD	Core PPI m/m		

	8:00pm	USD	Crude Oil Inventories		
ThuSep 13	4:30pm	GBP	MPC Official Bank Rate Votes		
		GBP	Monetary Policy Summary		
		GBP	Official Bank Rate		
		GBP	Asset Purchase Facility		
		GBP	MPC Asset Purchase Facility Votes		
	5:15pm	EUR	Main Refinancing Rate		
	6:00pm	EUR	ECB Press Conference		
		USD	CPI m/m		
		USD	Core CPI m/m		
FriSep 14	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
	6:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
	7:30pm	USD	Prelim UoM Consumer Sentiment		
SatSep 15					
SunSep 16					
MonSep 17	2:30pm	EUR	Final CPI y/y		
	6:00pm	USD	Empire State Manufacturing Index		
TueSep 18	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
		GBP	RPI y/y		
	2:30pm	EUR	German ZEW Economic Sentiment		
WedSep 19	Tentative	JPY	BOJ Policy Rate		
	Tentative	JPY	Monetary Policy Statement		
	Tentative	JPY	BOJ Press Conference		
	6:00pm	USD	Building Permits		
		USD	Housing Starts		
	8:00pm	USD	Crude Oil Inventories		
ThuSep 20	2:00pm	GBP	Retail Sales m/m		
	Tentative	All	OPEC-JMMC Meetings		
	6:00pm	USD	Philly Fed Manufacturing Index		
FriSep 21	2:00pm	GBP	Public Sector Net Borrowing		
SatSep 22					

SunSep 23					
MonSep 24	12:30pm	EUR	French Flash Manufacturing PMI		
		EUR	French Flash Services PMI		
	1:00pm	EUR	German Flash Manufacturing PMI		
		EUR	German Flash Services PMI		
	1:30pm	EUR	Flash Manufacturing PMI		
		EUR	Flash Services PMI		
		EUR	German Ifo Business Climate		
TueSep 25	7:30pm	USD	CB Consumer Confidence		
WedSep 26	8:00pm	USD	Crude Oil Inventories		
	11:30pm	USD	FOMC Economic Projections		
		USD	FOMC Statement		
		USD	Federal Funds Rate		
ThuSep 27	12:00am	USD	FOMC Press Conference		
	All Day	EUR	German Prelim CPI m/m		
	12:30pm	EUR	Spanish Flash CPI y/y		
	1:30pm	EUR	M3 Money Supply y/y		
	6:00pm	USD	Core Durable Goods Orders m/m		
		USD	Final GDP q/q		
		USD	Durable Goods Orders m/m		
FriSep 28	11:30am	EUR	German Retail Sales m/m		
	2:00pm	GBP	Current Account		
		GBP	Final GDP q/q		
	2:30pm	EUR	CPI Flash Estimate y/y		
		EUR	Core CPI Flash Estimate y/y		
	6:00pm	USD	Core PCE Price Index m/m		
		USD	Personal Spending m/m		
	7:15pm	USD	Chicago PMI		
	7:30pm	USD	Revised UoM Consumer Sentiment		
SatSep 29					
SunSep 30	6:30am	CNY	Manufacturing PMI		
		CNY	Non-Manufacturing PMI		

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