

MONTHLY **NEWS** LETTER

OCTOBER - 2018



MARKET MANTRA

Indira Securities Pvt. Ltd.

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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	36227.14	38645.07	-6.26%
NIFTY	10930.5	11680.5	-6.42%
BANK NIFTY	25217.17	28216.00	-10.63%



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 between 3 to 5 October 2018 for the fourth bi-monthly monetary policy for 2018-2019. The resolution of the MPC will be unveiled at 14:30 pm on 5 October 2018.
- US ISM Manufacturing PMI data for September will be unveiled on Monday, 1 October 2018. The Institute for Supply Management's Manufacturing PMI in the US jumped to 61.3 in August of 2018 from 58.1 in the previous month
- US ADP Employment Change data for September will be unveiled on Wednesday, 3 October 2018. Private businesses in the United States hired 163 thousand workers in August of 2018, compared with a downwardly revised 217 thousand in July.
- US Unemployment Rate data for September will be unveiled on Friday, 5 October 2018. The US unemployment rate was unchanged at 3.9% in August 2018.
- US Balance of Trade data for August will be unveiled on Friday, 5 October 2018. The US trade deficit widened by 9.5% to \$50.1 billion in July of 2018 from a downwardly revised \$45.7 billion in the previous month
- Nikkei Services PMI for September 2018 will be announced on Thursday, 4 October 2018. The Nikkei India Services PMI declined to 3-month low of 51.5 in August of 2018 from 54.2 in the previous month.
- Japan's Consumer Confidence data for September will be unveiled on Tuesday, 2 October 2018. The Consumer Confidence Index in Japan edged down to 43.3 in August of 2018 from 43.5 in the prior month.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14763.2	16881.33	-12.55%
SMALCAP	14430.68	17193.2	-16.07%
METAL	13278.79	13821.31	-3.93%
OIL&GAS	14855.41	15079.04	-1.48%
AUTO	21476.52	24716.48	-13.11%
TECK	7730.69	7817.25	-1.11%
BANKEX	27992.18	31741.91	-11.81%
IT	15628.94	15548.52	0.52%
FMCG	11502.75	12771.69	-9.94%
HC	15025.34	15945.17	-5.77%
PSU	7171.38	7907.6	-9.31%
CD	19134.28	21696.4	-11.81%
POWER	1929.43	2140.72	-9.87%
CG	17108.89	18996.76	-9.94%
REALITY	1702.94	2141.43	-20.48%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	26458.3	25964.8	1.90%
NASDAQ	8046.35	8109.54	-0.78%
FTSE	7510.2	7432.42	1.05%
NIKKEI	24142.5	22856	5.63%
HANGSENG	27788.5	27888.6	-0.36%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1193	1206.9	-1.15%
SILVER	14.65	14.43	1.52%
CRUDE	73.63	69.88	5.37%

CURRENCY	CLOSE	PREV. CLOSE
INR-1 USD	72.5474	70.9255
INR-1 EURO	84.4428	82.8391
INR-100 YEN	63.9000	63.9100
INR-1 POUND	94.9080	92.3530



NIFTY THIS MONTH = -750

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	11882	11356
2	12083	11033
3	12407	10831

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10258
50 Days	9041
100 Days	7402
200 Days	5193

TOP GAINERS

SCRIPT	CMP	% CHANGE
IL&FS Transportation	22.55	12.47
Indian Hotels Co	135.45	6.78
Cyient Ltd.	741.5	5.46
DB Corp	216.5	4.24
United Breweries Ltd	1363.25	4.16

TOP LOSERS

SCRIPT	CMP	% CHANGE
Infibeam Avenues	58.8	-67.58
Indiabulls Real Esta	88.85	-27.91
Centrum Capital	33.3	-24.32
PNB Housing Finance	888.8	-24.24
Jain Irrigation	60.95	-23.67

Stock at 52 Week High

SCRIPT	CMP
Gangotri Textiles	5.56
-	-
-	-
-	-
-	-

Stock at 52 Week Low

SCRIPT	CMP
Maruti Suzuki	7,350.55
Eicher Motors	24,165.25
Tata Motors	223.45
Hero MotoCorp	2,932.15
SBI Life Insuran	509.30

FII & DII ACTIVITY- SEP 2018

	AMOUNT
FII	-9469
DII	+12504

<i>DATE</i>	<i>TIME</i>	<i>CURRENCY</i>	<i>ECONOMIC DATA</i>	<i>FORECAST</i>	<i>PREVIOUS</i>
MonOct 1	11:30am	EUR	German Retail Sales m/m	0.40%	-0.40%
	2:00pm	GBP	Manufacturing PMI	52.6	52.8
		GBP	Net Lending to Individuals m/m	4.8B	4.0B
	6:30pm	USD	FOMC Member Bostic Speaks		
	7:30pm	USD	ISM Manufacturing PMI	60.1	61.3
TueOct 2	2:00pm	GBP	Construction PMI	52.8	52.9
	7:30pm	USD	FOMC Member Quarles Speaks		
	10:15pm	USD	Fed Chair Powell Speaks		
WedOct 3	2:00pm	GBP	Services PMI	54	54.3
	Tentative	USD	FOMC Member Barkin Speaks		
	5:45pm	USD	ADP Non-Farm Employment Change	187K	163K
	7:30pm	USD	ISM Non-Manufacturing PMI	58.1	58.5
	8:00pm	USD	Crude Oil Inventories		1.9M
	11:30pm	USD	FOMC Member Brainard Speaks		
	11:45pm	USD	FOMC Member Mester Speaks		
ThuOct 4	1:30am	USD	Fed Chair Powell Speaks		
	6:45pm	USD	FOMC Member Quarles Speaks		
FriOct 5	5:30am	JPY	Average Cash Earnings y/y	1.30%	1.60%
	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.40%
		USD	Non-Farm Employment Change	185K	201K
		USD	Unemployment Rate	3.80%	3.90%
	10:10pm	USD	FOMC Member Bostic Speaks		
TueOct 9	Tentative	CNY	Trade Balance		
WedOct 10	2:00pm	GBP	GDP m/m		
		GBP	Goods Trade Balance		
	6:00pm	USD	PPI m/m		
		USD	Core PPI m/m		
ThuOct 11	2:30am	USD	Treasury Currency Report		
	2:00pm	GBP	Manufacturing Production m/m		

		GBP	BOE Credit Conditions Survey		
	5:00pm	EUR	ECB Monetary Policy Meeting Accounts		
	6:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
	8:30pm	USD	Crude Oil Inventories		
FriOct 12	7:30pm	USD	Prelim UoM Consumer Sentiment		
MonOct 15	6:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
		USD	Empire State Manufacturing Index		
TueOct 16	7:00am	CNY	CPI y/y		
	7:30am	CNY	GDP q/y		
		CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
		CNY	NBS Press Conference		
	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
		GBP	RPI y/y		
	2:30pm	EUR	German ZEW Economic Sentiment		
WedOct 17	2:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Claimant Count Change		
		GBP	Unemployment Rate		
	2:30pm	EUR	Final CPI y/y		
	6:00pm	USD	Building Permits		
		USD	Housing Starts		
	8:00pm	USD	Crude Oil Inventories		
	11:30pm	USD	FOMC Meeting Minutes		
ThuOct 18	2:00pm	GBP	Retail Sales m/m		
	6:00pm	USD	Philly Fed Manufacturing Index		
MonOct 22	2:00pm	GBP	Public Sector Net Borrowing		
	Tentative	All	OPEC-JMMC Meetings		
TueOct 23					
WedOct 24	12:45pm	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	M3 Money Supply y/y		
	8:00pm	USD	Crude Oil Inventories		
ThuOct 25	1:30pm	EUR	German Ifo Business Climate		
	5:15pm	EUR	Main Refinancing Rate		
	6:00pm	EUR	ECB Press Conference		
		USD	Core Durable Goods Orders m/m		
		USD	Durable Goods Orders m/m		
FriOct 26	12:30pm	EUR	Spanish Flash GDP q/q		
		EUR	Spanish Unemployment Rate		
	6:00pm	USD	Advance GDP q/q		
		USD	Advance GDP Price Index q/q		
	7:30pm	USD	Revised UoM Consumer Sentiment		
SatOct 27					
SunOct 28					
MonOct 29	12:30pm	EUR	German Retail Sales m/m		
	3:00pm	GBP	Net Lending to Individuals m/m		
	3:30pm	EUR	EU Economic Forecasts		
	6:00pm	USD	Core PCE Price Index m/m		
		USD	Personal Spending m/m		
TueOct 30	All Day	EUR	German Prelim CPI m/m		
	1:30pm	EUR	Spanish Flash CPI y/y		
	3:30pm	EUR	Prelim Flash GDP q/q		
	7:30pm	USD	CB Consumer Confidence		
WedOct 31	Tentative	JPY	BOJ Policy Rate		
	Tentative	JPY	Monetary Policy Statement		
	Tentative	JPY	BOJ Outlook Report		
	Tentative	JPY	BOJ Press Conference		
	3:30pm	EUR	CPI Flash Estimate y/y		

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