

MONTHLY **NEWS** LETTER

JUNE - 2019



MARKET MANTRA

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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	39714.2	39031.55	1.75%
NIFTY	11922.8	11748.2	1.49%
BANK NIFTY	31375	29764.8	5.41%

MARKET COMMENTARY

- The outcome of the Reserve Bank of India's (RBI) monetary policy meeting and domestic 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 May 2019 starting from 1 June 2019.
- Trend in global markets, the movement of rupee against the dollar and crude oil price movement will also be monitored. Investors will keep a watch on inflows from foreign portfolio investors (FPIs) and domestic institutional investors (DIIs).
- The Reserve Bank of India (RBI's) Monetary Policy Committee (MPC) meeting is scheduled from 3 to 6 June 2019. The MPC of the RBI will announce its resolution under the Second Bi-monthly Monetary Policy Statement for 2019-20 on Thursday, 6 June 2019.
- India's Q4 gross domestic product (GDP) growth data will be released after market hours on Friday, 31 May 2019. India's GDP growth moderated to six-quarters low of 6.6% in Q3 of 2018-19 from 7% growth recorded in the previous quarter and 7.7% improvement in the corresponding quarter last year.
- India's infrastructure output data for April will also be unveiled after market on Friday, 31 May 2019. Infrastructure output in India rose 4.7% year-on-year in March 2019.
- On the global front, China's Caixin Manufacturing PMI data for May will be announced on 3 June 2019. The Japan's Nikkei Manufacturing PMI for May will also be announced on 3 June 2019. On the same day, US Markit Manufacturing PMI data for May will be announced.



BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14889.42	15479.62	-3.81%
SMALCAP	14624.56	15027.36	-2.68%
METAL	11513.24	11355.12	1.39%
OIL&GAS	15357.85	15269.7	0.58%
AUTO	18839.4	18824.89	0.08%
TECK	7979.32	7621.79	4.69%
BANKEX	33328.45	34141.94	-2.38%
IT	16263.51	15280.3	6.43%
FMCG	11764.37	11741.51	0.19%
HC	14367.02	14407.89	-0.28%
PSU	7446.22	7640.47	-2.54%
CD	23873.81	23856.65	0.07%
POWER	1969.54	2034.41	-3.19%
CG	18030.56	18471.99	-2.39%
REALITY	2008.64	2077.09	-3.30%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	24815	26430.1	-6.11%
NASDAQ	7453.15	8049.64	-7.41%
FTSE	7161.71	7385.26	-3.03%
NIKKEI	20366	22258.7	-8.50%
HANGSENG	26754	29766	-10.12%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1317.5	1275.5	3.29%
SILVER	14.65	14.66	-0.07%
CRUDE	53.08	63.41	-16.29%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE	
INR-1 USD	69.8058	69.8368	
INR-1 EURO	77.7288	78.0771	
INR-100 YEN	64.0800	62.6800	
INR-1 POUND	88.0093	90.3348	



NIFTY THIS MONTH = +174

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	11886	11579
2	12024	11410
3	12193	11272

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10896
50 Days	9476
100 Days	7836
200 Days	5596

TOP GAINERS

SCRIPT	CMP	% CHANGE
Edelweiss Fin. Ser	202.35	42.25
Just Dial	769.25	31.44
PNC Infratech	195.6	30.88
Birla Corporation Lt	651.65	29.94
KEI Industries	524.35	29.76

TOP LOSERS

SCRIPT	CMP	% CHANGE
Manpasand Beverage	51.4	-52.32
PC Jeweller L	77.15	-29.61
Vakrangee	47.35	-25.08
Cox & Kings L	92.55	-24.54
Jubilant Life Scienc	495	-23.9

STOCKS AT 52 Wk HIGH

SCRIPT	CMP
HDFC Bank	2,424.90
Bajaj Finance	3,469.70
HPCL	324.15
Muthoot Finance	650.05
Indraprastha Gas	337.10

STOCKS AT 52 Wk LOW

SCRIPT	CMP
CentralBank of India	25.05
Jubilant LifeScience	495.40
Blue Dart Express	2,687.60
Heritage Foods	413.40
Cox & Kings India	92.65

FII & DII ACTIVITY- MAY 2019

	AMOUNT
FII	-2136
DII	+5316

MAJOR EVENTS IN THIS MONTH

DATE	TIME	CUR	EVENT	FORCAST	PREVIOUS
SatJun 1					
SunJun 2					
MonJun 3	7:15am	CNY	Caixin Manufacturing PMI	50	50.2
	2:00pm	GBP	Manufacturing PMI	52.5	53.1
	6:40pm	USD	FOMC Member Quarles Speaks		
	7:30pm	USD	ISM Manufacturing PMI	53	52.8
	10:55pm	USD	FOMC Member Bullard Speaks		
TueJun 4	2:30pm	EUR	CPI Flash Estimate y/y	1.40%	1.70%
		EUR	Core CPI Flash Estimate y/y	1.00%	1.30%
	6:00pm	USD	FOMC Member Williams Speaks		
	7:25pm	USD	Fed Chair Powell Speaks		
WedJun 5	1:15pm	GBP	MPC Member Ramsden Speaks		
	2:00pm	GBP	Services PMI	50.6	50.4
	5:45pm	USD	ADP Non-Farm Employment Change	185K	275K
	7:15pm	USD	FOMC Member Clarida Speaks		
	7:30pm	USD	ISM Non-Manufacturing PMI	55.6	55.5
		USD	FOMC Member Bowman Speaks		
ThuJun 6	1:55pm	JPY	BOJ Gov Kuroda Speaks		
	2:30pm	GBP	BOE Gov Carney Speaks		
	5:15pm	EUR	Monetary Policy Statement		
		EUR	Main Refinancing Rate	0.00%	0.00%
	6:00pm	EUR	ECB Press Conference		
	10:30pm	USD	FOMC Member Williams Speaks		
FriJun 7	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.20%
		USD	Non-Farm Employment Change	180K	263K
		USD	Unemployment Rate	3.60%	3.60%
SatJun 8					
SunJun 9					

MonJun 10	2:00pm	GBP	GDP m/m		
	Tentative	GBP	Inflation Report Hearings		
	2:00pm	GBP	Manufacturing Production m/m		
TueJun 11	2:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Unemployment Rate		
	11th-14th	CNY	New Loans		
	6:00pm	USD	Core PPI m/m		
		USD	PPI m/m		
WedJun 12	7:00am	CNY	CPI y/y		
	6:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
ThuJun 13	Tentative	CNY	Trade Balance		
	Tentative	All	OPEC-JMMC Meetings		
FriJun 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		
SatJun 15					
SunJun 16					
MonJun 17					
TueJun 18	2:30pm	EUR	German ZEW Economic Sentiment		
	6:00pm	USD	Building Permits		
WedJun 19	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
	11:30pm	USD	FOMC Economic Projections		
		USD	FOMC Statement		
		USD	Federal Funds Rate		
ThuJun 20	12:00am	USD	FOMC Press Conference		
	Tentative	JPY	Monetary Policy Statement		
	Tentative	JPY	BOJ Press Conference		
	2:00pm	GBP	Retail Sales m/m		

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