

MONTHLY **NEWS** LETTER

JULY - 2019



MARKET MANTRA

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- **ONLINE IPO BIDDING**
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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	39394.64	39714.2	-0.80%
NIFTY	11788.8	11922.8	-1.12%
BANK NIFTY	31105	31375	-0.86%



MARKET COMMENTARY

- The Union Budget will be presented by Finance Minister Nirmala Sitharaman on Friday, 5 July 2019. After presenting the interim budget in February 2019, the Modi government will present its full-year budget 2019-20. The government is likely to amend several policies and schemes for delivering growth to the biggest drivers of the economy, including farmers, middle class, and the corporate sector.
- The outcome of the G20 meeting, progress of monsoon, trend in global markets, the movement of rupee against the dollar and crude oil price movement will dictate market trend. Investors will also keep a watch on inflows from foreign portfolio investors (FPIs) and domestic institutional investors (DIIs).
- Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for June 2019 starting from 1 July 2019.
- On the macro front, India's infrastructure output data for May will be unveiled after market hours on Friday, 28 June 2019.
- The Nikkei Manufacturing PMI for the month of June 2019 will be unveiled on Monday, 1 July 2019. The Nikkei India Manufacturing PMI increased to 52.7 in May 2019 from 51.8 in April 2019.
- The Nikkei Services PMI for the month of June 2019 will be announced on Wednesday, 3 July 2019. The Nikkei India Services PMI dropped to 50.2 in May 2019 from 51 in April 2019.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	14808.34	15479.62	-4.34%
SMALCAP	14239.33	15027.36	-5.24%
METAL	11107.22	11355.12	-2.18%
OIL&GAS	14803.26	15269.7	-3.05%
AUTO	17904.15	18824.89	-4.89%
TECK	7674.21	7621.79	0.69%
BANKEX	34971.86	34141.94	2.43%
IT	15654.11	15280.3	2.45%
FMCG	11361.92	11741.51	-3.23%
HC	12889.34	14407.89	-10.54%
PSU	7832.33	7640.47	2.51%
CD	26128	23856.65	9.52%
POWER	2093.86	2034.41	2.92%
CG	19855.41	18471.99	7.49%
REALITY	2201.44	2077.09	5.99%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	26600	24815	7.19%
NASDAQ	8,006.24	7453.15	7.42%
FTSE	7425.63	7161.71	3.69%
NIKKEI	21275.9	20366	4.47%
HANGSENG	28542.6	26754	6.69%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1412.5	1317.5	7.21%
SILVER	15.35	14.65	4.78%
CRUDE	58.2	53.08	9.65%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE	
INR-1 USD	69.2216	69.8058	
INR-1 EURO	78.5887	77.7288	
INR-100 YEN	64.0100	64.0800	
INR-1 POUND	87.7356	88.0093	



NIFTY THIS MONTH = -134

NIFTY TECHNICAL

MONTHLY	RESISTANCE	SUPPORT
1	12273	11340
2	12623	10757
3	13206	10407

NIFTY MOVING AVERAGE(MONTHLY)

20 Days	10969
50 Days	9548
100 Days	7900
200 Days	5650

TOP GAINERS

SCRIPT	CMP	% CHANGE
Syndicate Bank	41.85	16.9
REC	164.7	14.53
Trent Ltd.	440.6	14.34
Tata Global Beverage	269.95	14.02
Godrej Properties Lt	1003.3	13.32

TOP LOSERS

SCRIPT	CMP	% CHANGE
Cholamandalam Invest	284.05	-81.13
Cox & Kings L	36.45	-60.79
Biocon	250.4	-54.01
Jain Irrigation	25.8	-52.4
Syngene Internationa	333.85	-51.27

STOCKS AT 52 Wk HIGH

SCRIPT	CMP
SBI	360.90
Bajaj Finance	3,682.30
Bajaj Finserv	8,537.75
Titan Co	1,334.85
Havells India	785.65

STOCKS AT 52 Wk LOW

SCRIPT	CMP
TVS Motor	427.75
Glaxosmithkline Phar	1,199.50
Alkem Laboratories	1,668.65
Castrol India	132.65
Glenmark Pharma	442.80

FII & DII ACTIVITY- JUNE 2019

	AMOUNT
FII	-688
DII	+3643

MAJOR EVENTS IN THIS MONTH

DATE	TIME	CUR	EVENT	FORCAST	PREVIOUS
MonJul 1	7:15am	CNY	Caixin Manufacturing PMI	50.1	50.2
	2:00pm	GBP	Manufacturing PMI	49.5	49.4
	All Day	All	OPEC Meetings		
	7:30pm	USD	ISM Manufacturing PMI	51.3	52.1
TueJul 2	All Day	All	OPEC-JMMC Meetings		
	4:05pm	USD	FOMC Member Williams Speaks		
WedJul 3	2:00pm	GBP	Services PMI	51	51
	5:45pm	GBP	MPC Member Broadbent Speaks		
		USD	ADP Non-Farm Employment Change	140K	27K
	7:30pm	USD	ISM Non-Manufacturing PMI	56.1	56.9
ThuJul 4					
FriJul 5	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.20%
		USD	Non-Farm Employment Change	164K	75K
		USD	Unemployment Rate	3.60%	3.60%
SatJul 6					
SunJul 7					
MonJul 8	Tentative	CNY	Trade Balance		
TueJul 9	10th-14th	CNY	New Loans		
WedJul 10	7:00am	CNY	CPI y/y		
	2:00pm	GBP	GDP m/m		
		GBP	Manufacturing Production m/m		
	11:30pm	USD	FOMC Meeting Minutes		
ThuJul 11	Tentative	GBP	BOE Financial Stability Report		
	5:00pm	EUR	ECB Monetary Policy Meeting Accounts		
	6:00pm	USD	CPI m/m		
		USD	Core CPI m/m		

FriJul 12	Tentative	All	OPEC-JMMC Meetings		
	6:00pm	USD	PPI m/m		
		USD	Core PPI m/m		
	7:30pm	USD	Prelim UoM Consumer Sentiment		
SatJul 13					
SunJul 14					
MonJul 15	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
TueJul 16	2:00pm	GBP	Average Earnings Index 3m/y		
		GBP	Unemployment Rate		
	2:30pm	EUR	German ZEW Economic Sentiment		
	6:00pm	USD	Core Retail Sales m/m		
		USD	Retail Sales m/m		
WedJul 17	7:30am	CNY	GDP q/y		
	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
	6:00pm	USD	Building Permits		
ThuJul 18	2:00pm	GBP	Retail Sales m/m		
		GBP	BOE Credit Conditions Survey		
	6:00pm	USD	Philly Fed Manufacturing Index		
FriJul 19					
SatJul 20					
SunJul 21					
MonJul 22	12:45pm	EUR	French Flash Services PMI		
		EUR	French Flash Manufacturing 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		
	7:15pm	USD	Flash Manufacturing PMI		

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