

MONTHLY
NEWS
LETTER

AUGUST - 2019



MARKET MANTRA

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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	37118.22	39394.64	-5.78%
NIFTY	10997.3	11788.8	-6.71%
BANK NIFTY	28204	31105	-9.33%

MARKET COMMENTARY

- The outcome of the Reserve Bank of India's (RBI) monetary policy meeting will be closely watched next week. Besides, next batch of June 2019 quarterly earnings, domestic and global macro economic data, progress of monsoon, movement of rupee against the dollar, Brent crude oil price movement and investments by foreign portfolio investors (FPI) and domestic institutional investors (DII) are the other key events to be watched in the week ahead.
- On the earnings front, Indiabulls Housing Finance and Titan Company will announce its result on 6 August 2019. Cipla, HCL Technologies, Mahindra & Mahindra and Tata Steel will announce their Q1 June 2019 results on 7 August 2019. Ultratech Cement will announce its Q1 result on 8 August 2019. Bharat Petroleum Corporation, Hindalco Industries and GAIL (India) will announce their Q1 results on 9 August 2019.
- On the macro front, the IHS Markit India Services PMI for July 2019 will be announced on 5 August 2019.
- The third bi-monthly monetary policy review meeting will be held by the Reserve Bank of India (RBI) on 7 August 2019. The RBI cut policy rates for the 3rd consecutive time in June by a cumulative 75 basis points.
- Overseas, the China Caixin Services PMI for July 2019 will be announced on 5 August 2019. The China Caixin Composite PMI for July 2019 will also be announced on the same day. In Japan, the Cabinet Office will publish the April-June second quarter GDP data on 9 August 2019. The U.S. ISM Non-Manufacturing PMI for July 2019 will be announced on 5 August 2019.



BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	13546.92	14808.34	-8.52%
SMALCAP	12496.35	14239.33	-12.24%
METAL	9176.6	11107.22	-17.38%
OIL&GAS	13061.62	14803.26	-11.77%
AUTO	15635.32	17904.15	-12.67%
TECK	7596.16	7674.21	-1.02%
BANKEX	31902.97	34971.86	-8.78%
IT	15531.46	15654.11	-0.78%
FMCG	10982.5	11361.92	-3.34%
HC	12555.44	12889.34	-2.59%
PSU	6733.2	7832.33	-14.03%
CD	22567.42	26128	-13.63%
POWER	1938.36	2093.86	-7.43%
CG	17274.11	19855.41	-13.00%
REALITY	2029.58	2201.44	-7.81%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	26485	26600	-0.43%
NASDAQ	8,004.07	8,006.24	-0.03%
FTSE	7407.06	7425.63	-0.25%
NIKKEI	21067.8	21275.9	-0.98%
HANGSENG	26918.6	28542.6	-5.69%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1452.5	1412.5	2.83%
SILVER	16.23	15.35	5.73%
CRUDE	55.19	58.2	-5.17%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE	% CHANGE
INR-1 USD	69.0580	69.2216	-0.24%
INR-1 EURO	76.3059	78.5887	-2.91%
INR-100 YEN	63.2400	64.0100	-1.20%
INR-1 POUND	83.7457	87.7356	-4.55%



NIFTY THIS MONTH = -791

NIFTY TECHNICAL		
MONTHLY	RESISTANCE	SUPPORT
1	11733	10751
2	12348	10384
3	12715	9768

NIFTY MOVING AVERAGE(MONTHLY)	
20 Days	11036
50 Days	9654
100 Days	8006
200 Days	5750

TOP GAINERS		
SCRIPT	CMP	% CHANGE
Sun Pharma Advanced	158.7	33.75
Asian Paints Ltd.	1545.2	13.63
P&G Health	4736	11.31
Torrent Pharmac	1673.1	8.12
Gujarat Gas	176.35	8.12

TOP LOSERS		
SCRIPT	CMP	% CHANGE
Cox & Kings L	10.39	-65.13
GAIL (India) Ltd.	127.7	-58.5
Coffee Day Enterpris	99.9	-55.86
Indiabulls Integrate	99.9	-49.96
Vodafone Idea L	6.31	-48.82

STOCKS AT 52 Wk HIGH	
SCRIPT	CMP
Asian Paints	1,545.20
Uttam Value Steels	0.19
Quintegra Solutions	0.56
Grand Foundry	1.64

STOCKS AT 52 Wk LOW	
SCRIPT	CMP
ITC	264.60
Coal India	197.30
Hindustan Zinc	211.00
Godrej Consumer Prod	612.05
GAIL India	127.70

FII & DII ACTIVITY- JULY 2019	
	AMOUNT
FII	-3944
DII	+3374

MAJOR EVENTS IN THIS MONTH

DATE	TIME	CUR	EVENT	FORCAST	PREVIOUS
ThuAug 1	12:00am	USD	FOMC Press Conference		
	7:15am	CNY	Caixin Manufacturing PMI	49.6	49.4
	2:00pm	GBP	Manufacturing PMI	47.7	48
	4:30pm	GBP	BOE Inflation Report		
		GBP	MPC Official Bank Rate Votes	0-0-9	0-0-9
		GBP	Monetary Policy Summary		
		GBP	Official Bank Rate	0.75%	0.75%
		GBP	Asset Purchase Facility	435B	435B
		GBP	MPC Asset Purchase Facility Votes	0-0-9	0-0-9
	5:00pm	GBP	BOE Gov Carney Speaks		
	7:30pm	USD	ISM Manufacturing PMI	52	51.7
FriAug 2	6:00pm	USD	Average Hourly Earnings m/m	0.20%	0.30%
		USD	Non-Farm Employment Change	164K	193K
		USD	Unemployment Rate	3.60%	3.70%
	7:30pm	USD	Revised UoM Consumer Sentiment	98.5	98.4
	11:15pm	USD	President Trump Speaks		
SatAug 3					
SunAug 4					
MonAug 5	2:00pm	GBP	Services PMI	50.4	50.2
	7:30pm	USD	ISM Non-Manufacturing PMI	55.5	55.1
TueAug 6	9:30pm	USD	FOMC Member Bullard Speaks		
WedAug 7					
ThuAug 8	Tentative	CNY	Trade Balance	310B	345B
	8th-14th	CNY	New Loans		1660B
FriAug 9	7:00am	CNY	CPI y/y	2.70%	2.70%
	2:00pm	GBP	GDP m/m	0.10%	0.30%

		GBP	Manufacturing Production m/m	-0.10%	1.40%
		GBP	Prelim GDP q/q	0.00%	0.50%
	6:00pm	USD	Core PPI m/m		0.30%
		USD	PPI m/m		0.10%
SatAug 10					
SunAug 11					
MonAug 12					
TueAug 13	2:00pm	GBP	Average Earnings Index 3m/y		
	6:00pm	USD	CPI m/m		
		USD	Core CPI m/m		
WedAug 14	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
	11:30am	EUR	German Prelim GDP q/q		
	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
ThuAug 15	6:00pm	USD	Core Retail Sales m/m		
		USD	Philly Fed Manufacturing Index		
		USD	Retail Sales m/m		
FriAug 16	Tentative	All	OPEC-JMMC Meetings		
	6:00pm	USD	Building Permits		
	7:30pm	USD	Prelim UoM Consumer Sentiment		
SatAug 17					
SunAug 18					
MonAug 19	2:00pm	GBP	Public Sector Net Borrowing		
TueAug 20	2:30pm	EUR	German ZEW Economic Sentiment		
WedAug 21	Day 1	All	Jackson Hole Symposium		
	11:30pm	USD	FOMC Meeting Minutes		
ThuAug 22	5:00pm	EUR	ECB Monetary Policy Meeting Accounts		
	Day 2	All	Jackson Hole Symposium		
FriAug 23	12:45pm	EUR	French Flash Services PMI		
		EUR	French Flash Manufacturing PMI		

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