

MONTHLY
NEWS
LETTER

SEPTEMBER -
2019



MARKET MANTRA

Indira Securities Pvt. Ltd.

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MONTHLY INDICES CHANGE

INDEX	CLOSE	PRV. CLOSE	% CHANGE
SENSEX	37332.79	37481	-0.40%
NIFTY	11023.2	11118	-0.85%
BANK NIFTY	27427	28876	-5.02%



MARKET COMMENTARY

- Domestic and global macroeconomic data will be closely watched in the truncated trading week ahead. Besides, global cues, 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) will also be tracked.
- Local stock markets remain closed on Monday, 2 September 2019 on account of Ganesh Chaturthi.
- Auto stocks will be in focus as auto companies will start announcing monthly sales numbers for August 2019 starting from 1 September 2019.
- On the macro front, India's Q2 gross domestic product (GDP) growth data will be released after market hours on Friday, 30 August 2019. The Indian economy advanced 5.8% year-on-year in the first quarter of 2019, slowing from a 6.6% expansion in the previous period.
- India's infrastructure output data for July will be unveiled after market hours on Friday, 30 August 2019. India's infrastructure output grew 0.2% from a year earlier in June 2019.
- Markit Manufacturing PMI for August 2019 will be unveiled on Monday, 2 September 2019. Markit Services PMI for August 2019 will be unveiled on Wednesday, 4 September 2019. In China, the Caixin Manufacturing PMI for August 2019 will be announced on Monday, 2 September 2019.

BSE SECTORIAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
MIDCAP	13467.55	13546.92	-0.59%
SMALCAP	12534.7	12496.35	0.31%
METAL	8524.28	9176.6	-7.11%
OIL&GAS	13163.72	13061.62	0.78%
AUTO	15768.4	15635.32	0.85%
TECK	7853.07	7596.16	3.38%
BANKEK	30949.72	31902.97	-2.99%
IT	16149.45	15531.46	3.98%
FMCG	11077.23	10982.5	0.86%
HC	12875.4	12555.44	2.55%
PSU	6348.92	6733.2	-5.71%
CD	23420.17	22567.42	3.78%
POWER	1887.96	1938.36	-2.60%
CG	16941.77	17274.11	-1.92%
REALITY	2047.65	2029.58	0.89%

GLOBAL INDICES

INDEX	CLOSE	PRV. CLOSE	% CHANGE
DOW JONES	26403.3	26485	-0.31%
NASDAQ	7,962.88	8,004.07	-0.51%
FTSE	7281.94	7407.06	-1.69%
NIKKEI	20641.5	21067.8	-2.02%
HANGSENG	25606	26918.6	-4.88%

COMMODITY MARKET

COMMODITY	CLOSE	PRV. CLOSE	% CHANGE
GOLD	1532.7	1452.5	5.52%
SILVER	18.49	16.23	13.92%
CRUDE	54.9	55.19	-0.53%

CURRENCY RATES

CURRENCY	CLOSE	PRV. CLOSE
INR-1 USD	71.7586	69.0580
INR-1 EURO	79.2397	76.3059
INR-100 YEN	67.4900	63.2400
INR-1 POUND	87.4292	83.7457



NIFTY THIS MONTH = -670

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

NIFTY MOVING AVERAGE(MONTHLY)	
20 Days	11038
50 Days	9655
100 Days	8006
200 Days	5750

TOP GAINERS		
SCRIPT	CMP	% CHANGE
Navkar Corporation L	33.2	65.17
Godfrey Philips	1024.95	47.88
Bombay Dyeing	84	26.98
NIIT Technologies	1489	24.06
Reliance NipLifeAML	273.75	21.32

TOP LOSERS		
SCRIPT	CMP	% CHANGE
Cox & Kings L	4.19	-59.67
HDIL	5.84	-49.08
CG Power and Indust	10.4	-42.7
Inox Wind Ltd.	32.9	-36.61
Parag Milk Foods	140.2	-36.49

STOCKS AT 52 Wk HIGH	
SCRIPT	CMP
Infosys	814.60
Asian Paints	1,615.20
ICICI Prudential	424.50
HDFC Asset Mngt. Co	2,558.50
Petronet LNG	266.80

STOCKS AT 52 Wk LOW	
SCRIPT	CMP
Bank Of Baroda	92.60
Dalmia Bharat	904.10
Godrej Industries	420.10
Jyothy Labs	142.50
Vardhman Textiles	873.40

FII & DII ACTIVITY- AUGUST 2019	
	AMOUNT
FII	-14828
DII	+20933

MAJOR EVENTS IN THIS MONTH

DATE	TIME	CUR	EVENT	FORCAST	PREVIOUS
MonSep 2	7:15am	CNY	Caixin Manufacturing PMI	49.8	49.9
	2:00pm	GBP	Manufacturing PMI	48	48
TueSep 3	7:30pm	USD	ISM Manufacturing PMI	51.2	51.2
WedSep 4	2:30am	USD	FOMC Member Rosengren Speaks		
	7:15am	CNY	Caixin Services PMI	51.7	51.6
	2:00pm	GBP	Services PMI	51	51.4
	6:45pm	GBP	Inflation Report Hearings		
	6:55pm	USD	FOMC Member Williams Speaks		
	10:00pm	USD	FOMC Member Bullard Speaks		
ThuSep 5	12:45am	USD	FOMC Member Evans Speaks		
	5:45pm	USD	ADP Non-Farm Employment Change	148K	156K
	7:30pm	USD	ISM Non-Manufacturing PMI	54	53.7
	8:00pm	GBP	MPC Member Tenreyro Speaks		
	8:30pm	USD	Crude Oil Inventories		-10.0M
FriSep 6	6:00pm	USD	Average Hourly Earnings m/m	0.30%	0.30%
		USD	Non-Farm Employment Change	160K	164K
		USD	Unemployment Rate	3.70%	3.70%
	10:00pm	USD	Fed Chair Powell Speaks		
SatSep 7					
SunSep 8					
MonSep 9	2:00pm	GBP	GDP m/m		0.00%
		GBP	Manufacturing Production m/m		-0.20%
TueSep 10	7:00am	CNY	CPI y/y		2.80%
	2:00pm	GBP	Average Earnings Index 3m/y		3.70%
	11th-15th	CNY	New Loans		1060B
WedSep 11	6:00pm	USD	Core PPI m/m		-0.10%

		USD	PPI m/m		0.20%
	8:00pm	USD	Crude Oil Inventories		
ThuSep 12	Tentative	CNY	Trade Balance		310B
	Tentative	All	OPEC-JMMC Meetings		
	5:15pm	EUR	Main Refinancing Rate	0.00%	0.00%
		EUR	Monetary Policy Statement		
	6:00pm	EUR	ECB Press Conference		
		USD	CPI m/m		0.30%
		USD	Core CPI m/m		0.30%
FriSep 13	6:00pm	USD	Core Retail Sales m/m		1.00%
		USD	Retail Sales m/m		0.70%
	7:30pm	USD	Prelim UoM Consumer Sentiment		89.8
SatSep 14					
SunSep 15					
MonSep 16	7:30am	CNY	Fixed Asset Investment ytd/y		
		CNY	Industrial Production y/y		
TueSep 17	2:30pm	EUR	German ZEW Economic Sentiment		
	Tentative	All	OPEC-JMMC Meetings		
WedSep 18	2:00pm	GBP	CPI y/y		
		GBP	PPI Input m/m		
	6:00pm	USD	Building Permits		
	8:00pm	USD	Crude Oil Inventories		
	11:30pm	USD	FOMC Economic Projections		
		USD	FOMC Statement		
		USD	Federal Funds Rate		
ThuSep 19	12:00am	USD	FOMC Press Conference		
	Tentative	JPY	Monetary Policy Statement		
	Tentative	JPY	BOJ Press Conference		
	2:00pm	GBP	Retail Sales m/m		
	4:30pm	GBP	MPC Official Bank Rate Votes		
		GBP	Monetary Policy Summary		

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