



01 Jun.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,613	(0.1) %	4.1 %
BSE SENSEX	31,146	(0.0) %	4.1 %
CNX BANK	23,300	(0.5) %	8.1 %
CNX MIDCAP	17,573	0.4 %	1.4 %
CNX SMALLCAP	7,223	0.6 %	2.1 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,009	(0.1) %	5.7 %
S&P 500	2,412	(0.1) %	6.8 %
FTSE 100	7,520	(0.1) %	4.8 %
HANG SENG	25,661	(0.2) %	15.8 %
NIKKEI	19,651	(0.1) %	0.3 %
SHANGHAI COMPOSITE	3,117	0.2 %	(0.6) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.51	(0.2) %	(4.3) %
EUR/USD	1.12	0.6 %	6.1 %
GBP/USD	1.29	0.4 %	4.7 %
USD/JPY	110.95	(0.2) %	(4.3) %
USD/AUD	1.35	0.7 %	(1.2) %
USD/SGD	1.38	(0.1) %	(3.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	(2.7) %	(7.7) %
Gold(INR/10g)	28,839	(0.0) %	3.7 %
Gold Comex(USD/oz)	1,272	0.8 %	9.9 %
SILVER(INR/1Kg)	39,691	(0.1) %	2.0 %
Aluminium(USD/MT)	1,920	(1.2) %	12.8 %
Copper(USD/MT)	5,616	0.1 %	0.7 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.2	0.0 %	(0.2) %

Global Economy: The US economy continued to expand at a "moderate or modest" pace in the past few months, according to the Federal Reserve's Beige Book survey. Boston and Chicago signaled that growth had slowed somewhat to a modest pace since the prior Beige Book period, while New York indicated that activity had flattened out. Labor markets continued to tighten, with most Districts citing shortages across a broadening range of occupations and regions. Business activity in the Chicago area grew again in May to the highest in more than two years, according to industry data. The Institute For Supply Management - Chicago said its composite index, also known as the Chicago PMI, rose to 59.4 for May. This compared to a reading of 58.3 for the previous month. Any reading above 50 indicates expansion

Global Equities: Dow slipped for third session as US President Donald Trump decided to withdraw from the Paris climate accord. Markets have been weary this week, amid significant geopolitical tensions.

Indian Economy: India's Gross Domestic Product (GDP) rose at moderated pace of 6.1% in Q4FY2017, which is the lowest pace of growth in last nine quarters. The GSP growth decelerated sharply from 7% growth recorded in the preceding last quarter and 8.7% surge posted in the corresponding quarter last year. Another measure of economic activity - Gross Value Added (GVA) grew at slower pace in last 12 quarters at 5.6% in Q4FY2017 compared with 6.7% in Q3FY2017 and 8.7% in Q4FY2016. Growth rates in various sectors for Q4FY2017 are as agriculture, forestry and fishing (5.2%), mining and quarrying (6.4%), manufacturing (5.3%), electricity, gas and water supply and other utility services (6.1%) construction (-3.7%), Trade, hotels, transport, communication and services related to broadcasting (6.5%), financial, real estate and professional services (2.2%), and Public administration, defence and Other Services (17%).

Equity Markets: Key benchmark indices registered small losses in a lackluster trading session. Investors booked profits after key benchmarks advanced in the past four trading session.

Corporate News: Auto stocks will be in focus as these companies will start reporting sales volume data for May 2017, starting from today, 1 June 2017. Shares of public sector oil marketing companies (PSU OMCs) will be watched. Indian Oil Corporation (IOCL) yesterday, 31 May 2017, announced an increase in the price of petrol and diesel with effect from the midnight of 31 May/1 June 2017. Petrol price was hiked by Rs 1.23 per litre and diesel price was raised by Rs 0.89 a litre at Delhi (excluding state levies). MOIL announced increase in price of various grades of manganese ore effective from 1 June 2017. Pfizer announced after market hours yesterday, 31 May 2017, that it entered into an acquisition agreement with AstraZeneca AB, Sweden, pursuant to which the brand 'Neksium' is being acquired by the company in India for a consideration of Rs 75 crore, subject to completion of necessary conditions precedent. Neksium (esomeprazole) complements the company's existing product portfolio in the gastrointestinal (GI) therapeutic area.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(26.6)	68.4	26.9
MF(INR cr)	449.4	448.0	531.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	43,365	30,842	30,642
F&O(INR cr)	447,682	540,064	533,527

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.4	10.9	11.9
NSE VIX	11.8	11.3	11.4

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,425	0.5 %	8.7 %	Energy	11,926	(0.2) %	0.9 %
IT	10,549	(0.6) %	(0.4) %	Pharma	9,025	0.4 %	(14.1) %
Metals	2,953	(1.5) %	(4.9) %	Finance	9,510	0.4 %	7.8 %
Auto	10,871	0.6 %	9.6 %	PSU	3,514	(0.2) %	(0.3) %
FMCG	25,842	0.2 %	9.3 %	Real Estate	250	1.1 %	14.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
United Spi	2,265	8.3 %	10.7 %	Rural Elec	193	(6.1) %	7.5 %
Interglobe	1,107	4.4 %	6.1 %	Godrej Con	1,812	(2.7) %	6.8 %
Indiabulls	1,161	4.2 %	16.5 %	Oil India	307	(2.6) %	(7.1) %
M & M	1,417	4.1 %	10.1 %	Vedanta	239	(2.6) %	(12.5) %
Havells In	487	3.5 %	4.0 %	Power Fin.	134	(2.4) %	(9.6) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (MAY)	01-06-2017	6:30	AUD	-	132.7
CoreLogic House Px (MoM) (MAY)	01-06-2017	0:00	AUD	-	0.001
Private Capital Expenditure (1Q)	01-06-2017	1:30	AUD	-	(0.021)
RBA Commodity Index SDR (YoY) (MAY)	01-06-2017	6:30	AUD	-	0.386
Retail Sales s.a. (MoM) (APR)	01-06-2017	1:30	AUD	-	(0.001)
Markit Canada Manufacturing PMI (MAY)	01-06-2017	13:30	CAD	-	55.9
MLI Leading Indicator (MoM) (APR)	01-06-2017	11:00	CAD	-	0.005
Gross Domestic Product (QoQ) (1Q)	01-06-2017	5:45	CHF	-	0.001
Gross Domestic Product (YoY) (1Q)	01-06-2017	5:45	CHF	-	0.006
Retail Sales (Real) (YoY) (APR)	01-06-2017	7:15	CHF	-	0.021
SVME-Purchasing Managers Index (MAY)	01-06-2017	7:30	CHF	-	57.4
Caixin China PMI Mfg (MAY)	01-06-2017	1:45	CNY	-	50.3
Italian Gross Domestic Product s.a. and w.d.a. (QoQ) (1Q F)	01-06-2017	8:00	EUR	-	0.002
Italian Gross Domestic Product s.a. and w.d.a. (YoY) (1Q F)	01-06-2017	8:00	EUR	-	0.008
Markit Eurozone Manufacturing PMI (MAY F)	01-06-2017	8:00	EUR	-	57
Markit France Manufacturing PMI (MAY F)	01-06-2017	7:50	EUR	-	54
Markit/ADACI Italy Manufacturing PMI (MAY)	01-06-2017	7:45	EUR	-	56.2
Markit/BME Germany Manufacturing PMI (MAY F)	01-06-2017	7:55	EUR	-	59.4
Markit UK PMI Manufacturing SA (MAY)	01-06-2017	8:30	GBP	-	57.3
Nationwide House Prices n.s.a. (YoY) (MAY)	01-06-2017	6:00	GBP	-	0.026
Nationwide House Prices s.a. (MoM) (MAY)	01-06-2017	6:00	GBP	-	(0.004)
BOJ Harada speaks in Gifu	01-06-2017	1:30	JPY	-	-
Monetary Base (YoY) (MAY)	01-06-2017	23:50	JPY	-	0.198
Monetary Base End of period (MAY)	01-06-2017	23:50	JPY	-	-
Nikkei Japan PMI Mfg (MAY F)	01-06-2017	0:30	JPY	-	52
Vehicle Sales (YoY) (MAY)	01-06-2017	5:00	JPY	-	0.054
Central Bank Monetary Policy Minutes from May Meeting	01-06-2017	14:00	MXN	-	-
ADP Employment Change (MAY)	01-06-2017	12:15	USD	-	-
Challenger Job Cuts (YoY) (MAY)	01-06-2017	11:00	USD	-	(0.120)



Construction Spending (MoM) (APR)	01-06-2017	14:00	USD	-	(0.002)
Continuing Claims (20 MAY)	01-06-2017	12:30	USD	-	-
DOE Cushing OK Crude Inventory (26 MAY)	01-06-2017	15:00	USD	-	-
DOE U.S. Crude Oil Inventories (26 MAY)	01-06-2017	15:00	USD	-	-
DOE U.S. Distillate Inventory (26 MAY)	01-06-2017	15:00	USD	-	-
DOE U.S. Gasoline Inventories (26 MAY)	01-06-2017	15:00	USD	-	-
EIA Natural Gas Storage Change (26 MAY)	01-06-2017	14:30	USD	-	75
EIA Working Natural Gas Implied Flow (26 MAY)	01-06-2017	14:30	USD	-	75
Fed's Powell Speaks on Normalization of Monetary Policy	01-06-2017	12:00	USD	-	-
Fed's Williams Speaks in Seoul	01-06-2017	0:10	USD	-	-
Initial Jobless Claims (27 MAY)	01-06-2017	12:30	USD	-	-
ISM Employment (MAY)	01-06-2017	14:00	USD	-	52
ISM Manufacturing (MAY)	01-06-2017	14:00	USD	-	54.8
ISM New Orders (MAY)	01-06-2017	14:00	USD	-	57.5
ISM Prices Paid (MAY)	01-06-2017	14:00	USD	-	68.5
Markit US Manufacturing PMI (MAY F)	01-06-2017	13:45	USD	-	52.5
Non-Farm Productivity (1Q F)	01-06-2017	12:30	USD	-	(0.006)
Unit Labor Costs (1Q F)	01-06-2017	12:30	USD	-	0.03

..... End of Report

