



01 Sep.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,960	0.4 %	7.8 %
BSE SENSEX	31,730	0.3 %	6.6 %
CNX BANK	24,423	0.4 %	13.3 %
CNX MIDCAP	18,464	1.0 %	6.5 %
CNX SMALLCAP	7,818	0.9 %	10.5 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,948	0.3 %	10.4 %
S&P 500	2,472	0.6 %	9.5 %
FTSE 100	7,431	0.9 %	3.5 %
HANG SENG	27,970	(0.4) %	26.3 %
NIKKEI	19,646	0.7 %	0.3 %
SHANGHAI COMPOSITE	3,361	(0.1) %	7.2 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	63.91	(0.1) %	(5.2) %
EUR/USD	1.19	0.3 %	12.3 %
GBP/USD	1.29	0.3 %	5.3 %
USD/JPY	110.03	(0.4) %	(5.1) %
USD/AUD	1.26	(0.7) %	(8.1) %
USD/SGD	1.36	(0.2) %	(5.2) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	2.8 %	(9.7) %
Gold(INR/10g)	29,456	(0.5) %	5.9 %
Gold Comex(USD/oz)	1,325	1.3 %	14.5 %
SILVER(INR/1Kg)	39,555	(0.6) %	1.6 %
Aluminium(USD/MT)	2,114	2.3 %	24.2 %
Copper(USD/MT)	6,792	0.5 %	21.9 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.1	(0.0) %	(0.3) %

**Global Economy:** Chicago-area business activity saw continued growth in the month of August, according to a report released by MNI Indicators on Thursday. MNI Indicators said its Chicago business barometer came in at 58.9 in August, unchanged from July. A reading above 50 indicates growth. The barometer came in unchanged as gains in production and demand were offset by losses in backlogs, employment and supplier deliveries. The report said the new orders and production indexes increased slightly in August after showing notable declines in July. On the other hand, the Employment indicator slipped for the third month in a row in August, falling below 50 for the first time since March. With inventory woes throughout the country continuing to stall contract activity, the US National Association of Realtors released a report on Thursday showing an unexpected drop in pending home sales in the US in the month of July. NAR said its pending home sales index fell by 0.8% in July.

**Global Equities:** US stocks edged up yesterday, adding to the gains posted in the two previous sessions. The tech-heavy Nasdaq reached a new record closing high.

**Indian Economy:** The economic growth eased in the April-June quarter, slowing to a three-year low as companies stalled production in June to prepare for the switch-over to the Goods & Services Tax regime. Data released by the Central Statistics Office (CSO) on Thursday showed the economy grew 5.7% in April-June, the first quarter of the current fiscal year, slower than the previous quarter's 6.1% and lower than the 7.9% growth registered in the first quarter of 2016-17.

**Equity Markets:** Key benchmark indices settled with small gains after a volatile and range-bound session of trade as firmness in European stocks perked up indices in the latter half of the session. Trading was range-bound as investors maintained caution ahead of announcement of Q1 June 2017 gross domestic product data later during the day. Volatility was witnessed due to expiry of near month futures & options contracts. Indices gained for the second straight day.

**Corporate News:** NTPC disclosed after market hours yesterday, 31 August 2017, that Life Insurance Corporation of India (LIC) raised its stake in the company to 14.24% from 11.15% earlier. LIC purchased 3.089% stake in NTPC via the recently concluded offer for sale of shares. The two-day OFS opened for institutional investors on 29 August 2017, and retail investors got to bid on 30 August 2017. The government received bids for about 7% stake in NTPC, which will fetch over Rs 9000 crore to the exchequer. ABB India said it will provide solar inverters to 750 railway stations in north India to reduce dependence on traditional sources of energy. Indian Railways, which runs one of the largest railway networks in the world, carries more than 8 billion passengers annually. IRB Infrastructure Developers said its board approved sale of IRB Pathankot Amritsar Toll Road to IRB InvIT Fund for an enterprise value of Rs 1569 crore.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	15.4	(107.3)	1.3
MF(INR cr)	566.0	850.0	548.4

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	38,125	30,138	30,297
F&O(INR cr)	1,170,781	701,674	579,621

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.6	11.9	11.3
NSE VIX	12.0	13.2	11.7

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,318	0.0 %	12.9 %	Energy	13,150	1.2 %	11.3 %
IT	10,558	0.6 %	(0.3) %	Pharma	8,860	(0.5) %	(15.7) %
Metals	3,475	(0.1) %	11.9 %	Finance	10,099	0.3 %	14.4 %
Auto	10,613	0.4 %	7.0 %	PSU	3,291	0.3 %	(6.7) %
FMCG	25,835	0.3 %	9.3 %	Real Estate	280	1.4 %	28.0 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Idea Cellu	91	3.0 %	6.5 %	Bharti Inf	375	(2.5) %	13.9 %
Interglobe	1,228	2.7 %	17.8 %	Oil India	285	(2.4) %	(13.7) %
Wipro	299	2.7 %	18.0 %	Cummins In	913	(2.2) %	(5.1) %
Bajaj Auto	2,815	2.3 %	1.1 %	Bosch	21,987	(2.1) %	(2.9) %
Tata Power	79	2.1 %	(11.2) %	Coal India	237	(1.8) %	(19.5) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (AUG)	01-09-2017	6:30	AUD	-	114.4
CoreLogic House Px (MoM) (AUG)	01-09-2017	0:00	AUD	-	0.015
RBA Commodity Index SDR (YoY) (AUG)	01-09-2017	6:30	AUD	-	0.171
Markit Canada Manufacturing PMI (AUG)	01-09-2017	13:30	CAD	-	55.5
MLI Leading Indicator (MoM) (JUL)	01-09-2017	11:00	CAD	-	0.002
Retail Sales (Real) (YoY) (JUL)	01-09-2017	7:15	CHF	-	0.015
SVME-Purchasing Managers Index (AUG)	01-09-2017	7:30	CHF	-	60.9
Caixin China PMI Mfg (AUG)	01-09-2017	1:45	CNY	-	51.1
Italian Gross Domestic Product s.a. and w.d.a. (QoQ) (2Q F)	01-09-2017	8:00	EUR	-	0.004
Italian Gross Domestic Product s.a. and w.d.a. (YoY) (2Q F)	01-09-2017	8:00	EUR	-	0.015
Markit Eurozone Manufacturing PMI (AUG F)	01-09-2017	8:00	EUR	-	57.4
Markit France Manufacturing PMI (AUG F)	01-09-2017	7:50	EUR	-	55.8
Markit/ADACI Italy Manufacturing PMI (AUG)	01-09-2017	7:45	EUR	-	55.1
Markit/BME Germany Manufacturing PMI (AUG F)	01-09-2017	7:55	EUR	-	59.4
Markit UK PMI Manufacturing SA (AUG)	01-09-2017	8:30	GBP	-	55.1
Consumer Confidence Index (AUG)	01-09-2017	5:00	JPY	-	43.8
Nikkei Japan PMI Mfg (AUG F)	01-09-2017	0:30	JPY	-	52.8
Vehicle Sales (YoY) (AUG)	01-09-2017	5:00	JPY	-	(0.011)
Average Hourly Earnings (MoM) (AUG)	01-09-2017	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (AUG)	01-09-2017	12:30	USD	-	0.025
Average Weekly Hours All Employees (AUG)	01-09-2017	12:30	USD	-	34.5
Baker Hughes U.S. Rig Count (SEP 01)	01-09-2017	17:00	USD	-	940
Change in Manufacturing Payrolls (AUG)	01-09-2017	12:30	USD	-	-
Change in Non-farm Payrolls (AUG)	01-09-2017	12:30	USD	-	-
Change in Private Payrolls (AUG)	01-09-2017	12:30	USD	-	-
Construction Spending (MoM) (JUL)	01-09-2017	14:00	USD	-	(0.013)
ISM Employment (AUG)	01-09-2017	14:00	USD	-	55.2
ISM Manufacturing (AUG)	01-09-2017	14:00	USD	-	56.3
ISM Non-Manufacturing (AUG)	01-09-2017	14:00	USD	-	60.4



ISM Prices Paid (AUG)	01-09-2017	14:00	USD	-	62
Labor Force Participation Rate (AUG)	01-09-2017	12:30	USD	-	0.629
Markit US Manufacturing PMI (AUG F)	01-09-2017	13:45	USD	-	52.5
Two-Month Payroll Net Revision (AUG)	01-09-2017	12:30	USD	-	-
U. of Mich. 1 Yr Inflation (AUG F)	01-09-2017	14:00	USD	-	0.026
U. of Mich. 5-10 Yr Inflation (AUG F)	01-09-2017	14:00	USD	-	0.025
U. of Mich. Current Conditions (AUG F)	01-09-2017	14:00	USD	-	111
U. of Mich. Expectations (AUG F)	01-09-2017	14:00	USD	-	89
U. of Michigan Confidence (AUG F)	01-09-2017	14:00	USD	-	97.6
Underemployment Rate (AUG)	01-09-2017	12:30	USD	-	0.086
Unemployment Rate (AUG)	01-09-2017	12:30	USD	-	0.043

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