



01 Nov.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,390	0.5 %	12.5 %
BSE SENSEX	33,213	(0.2) %	11.5 %
CNX BANK	25,197	0.7 %	16.9 %
CNX MIDCAP	19,690	0.6 %	13.6 %
CNX SMALLCAP	8,617	0.8 %	21.8 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	23,377	0.1 %	17.6 %
S&P 500	2,575	0.1 %	14.1 %
FTSE 100	7,493	0.1 %	4.4 %
HANG SENG	28,246	(0.3) %	27.5 %
NIKKEI	22,012	0.0 %	12.3 %
SHANGHAI COMPOSITE	3,393	0.1 %	8.2 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.75	(0.5) %	(4.0) %
EUR/USD	1.16	0.3 %	9.8 %
GBP/USD	1.33	1.2 %	8.0 %
USD/JPY	113.87	0.2 %	(1.8) %
USD/AUD	1.31	0.3 %	(4.5) %
USD/SGD	1.36	(0.1) %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	54	0.4 %	3.9 %
Gold(INR/10g)	29,333	0.2 %	5.5 %
Gold Comex(USD/oz)	1,271	(0.5) %	9.8 %
SILVER(INR/1Kg)	38,830	0.3 %	(0.2) %
Aluminium(USD/MT)	2,140	(0.1) %	25.7 %
Copper(USD/MT)	6,802	(0.3) %	22.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.4	0.0 %	(0.1) %

Global Economy: Consumer confidence in the US saw a significant improvement in the month of October, hitting 17 year highs. The Conference Board said its consumer confidence index jumped to 125.9 in October from an upwardly revised 120.6 in September. China's manufacturing sector expanded at a slower but stable pace in October, according to official data. The manufacturing purchasing managers' index (PMI) came in at 51.6, moderating from 52.4 in September and 51.7 in August, according to the National Bureau of Statistics. A reading above 50 indicates expansion, while below reflects contraction. Euro area gross domestic product climbed 0.6% quarter-on-quarter, but the rate was slightly slower than the revised 0.7% expansion seen in the second quarter. On a yearly basis, the economy grew 2.5%, which was faster than the 2.3% rise logged in the second quarter. Euro zone inflation slowed in October, edging slightly further away from the European Central Bank's target. The European Union's statistics office said the preliminary reading showed that the consumer price index rose at an annual rate of 1.4% in October, down from 1.5% in September. UK consumer confidence index fell by one point to -10 in October, survey data from GfK showed. The consumer sentiment weakened in October on concerns about wider economic prospects but willingness to buy improved for the third straight month. The Bank of Japan decided by an 8-1 majority vote to hold its target of raising the amount of outstanding JGB holdings at an annual pace of about JPY 80 trillion.

Global Equities: A flurry of global economic data releases kept the markets active. However, overall mood was muted ahead of key central bank policy decisions from the Federal Reserve and the Bank of England.

Indian Economy: India reported fiscal deficit of \$77.09 billion for April-September or 91.3% of the budgeted target for the current fiscal year that ends in March 2018. The deficit was 83.9% of the full-year target during the same period a year ago. Net tax receipts in the first six months of 2017/18 fiscal year were Rs 5.42 lakh crore, government data showed on Tuesday.

Equity Markets: Local stocks ended the last session lower as investors took some cash off the table after indices scaled record highs in the previous trading session. Indices opened lower, tracking mixed cues in the Asian market and lower close for US stocks overnight. Trading turned volatile as the session proceeded as key benchmark indices re-entered negative terrain after hitting fresh intraday high in morning trade. Stocks hit fresh intraday low in mid-morning trade as selling pressure intensified.

Corporate News: If the change of perception for PSU banks, post the mega capital infusion scheme is any indication, dilution of government equity, up to 52% in the state-owned lenders can fetch valuation much higher than the estimated potential of Rs 58,000 crore as provided in the Rs 2,11,000 crore re-capitalisation plan, an ASSOCHAM report has said. Bharti Airtel has reported second quarter profit at Rs 586.1 crore, lower by 5.1% on sequential basis. Revenue from operations slipped 0.8% quarter-on-quarter to Rs 21,776.9 crore for September quarter.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	8.6	16.9	(8.3)
MF(INR cr)	307.6	478.9	602.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	39,928	34,272	31,184
F&O(INR cr)	345,494	654,086	599,535

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.2	10.1	11.0
NSE VIX	12.4	11.7	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,019	0.1 %	16.1 %	Energy	14,511	(0.1) %	22.8 %
IT	10,838	(0.2) %	2.3 %	Pharma	9,756	0.0 %	(7.1) %
Metals	3,877	(1.7) %	24.8 %	Finance	10,236	0.1 %	16.0 %
Auto	11,370	(0.5) %	14.6 %	PSU	3,784	(2.1) %	7.3 %
FMCG	25,688	0.2 %	8.7 %	Real Estate	305	2.9 %	39.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Axis Bank	523	8.1 %	4.5 %	Power Fin.	139	(3.6) %	(5.7) %
DLF	201	7.2 %	37.1 %	Punjab Nat	197	(3.3) %	31.5 %
Bharat Ele	185	5.2 %	27.0 %	LIC Housin	599	(3.2) %	(4.2) %
Dabur Indi	333	3.3 %	18.7 %	UPL	799	(3.0) %	8.7 %
Bharti Inf	442	2.9 %	34.2 %	Bank of Ba	170	(2.7) %	(1.5) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Commodity Index AUD (OCT)	01-11-2017	5:30	AUD	-	120.8
RBA Commodity Index SDR (YoY) (OCT)	01-11-2017	5:30	AUD	-	0.183
Markit Canada Manufacturing PMI (OCT)	01-11-2017	13:30	CAD	-	55
MLI Leading Indicator (MoM) (SEP)	01-11-2017	11:00	CAD	-	0.002
Poloz and Wilkins testify at Senate	01-11-2017	20:15	CAD	-	-
PMI Manufacturing (OCT)	01-11-2017	8:30	CHF	-	61.7
SNB's Zurbruegg Speaks in Bern	01-11-2017	17:15	CHF	-	-
Caixin China PMI Mfg (OCT)	01-11-2017	1:45	CNY	-	51
Bank of England's Jon Cunliffe Speaks at House of Lords	01-11-2017	10:00	GBP	-	-
BRC Shop Price Index (YoY) (OCT)	01-11-2017	0:01	GBP	-	(0.001)
Markit UK PMI Manufacturing SA (OCT)	01-11-2017	9:30	GBP	-	55.9
Nationwide House PX (MoM) (OCT)	01-11-2017	7:00	GBP	-	0.002
Nationwide House Px n.s.a. (YoY) (OCT)	01-11-2017	7:00	GBP	-	0.02
BOJ Nakaso speaks at FinTech Forum	01-11-2017	5:00	JPY	-	-
Foreign Buying Japan Bonds (OCT 27)	01-11-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (OCT 27)	01-11-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (OCT 27)	01-11-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (OCT 27)	01-11-2017	23:50	JPY	-	-
Monetary Base (YoY) (OCT)	01-11-2017	23:50	JPY	-	0.156
Monetary Base End of period (OCT)	01-11-2017	23:50	JPY	-	-
Nikkei Japan PMI Mfg (OCT F)	01-11-2017	0:30	JPY	-	52.5
Vehicle Sales (YoY) (OCT)	01-11-2017	5:00	JPY	-	0.004
ANZ Job Advertisements (MoM) (OCT)	01-11-2017	21:00	NZD	-	0.004
QV House Prices (YoY) (OCT)	01-11-2017	16:00	NZD	-	0.043
ADP Employment Change (OCT)	01-11-2017	12:15	USD	-	-
Construction Spending (MoM) (SEP)	01-11-2017	14:00	USD	-	0.005
DOE Cushing OK Crude Inventory (OCT 27)	01-11-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (OCT 27)	01-11-2017	14:30	USD	-	-
DOE U.S. Distillate Fuel Inventory (OCT 27)	01-11-2017	14:30	USD	-	-



DOE U.S. Gasoline Inventories (OCT 27)	01-11-2017	14:30	USD	-	-
FOMC Rate Decision (Lower Bound) (NOV 01)	01-11-2017	18:00	USD	-	0.01
FOMC Rate Decision (Upper Bound) (NOV 01)	01-11-2017	18:00	USD	-	0.0125
ISM Employment (OCT)	01-11-2017	14:00	USD	-	60.3
ISM Manufacturing (OCT)	01-11-2017	14:00	USD	-	60.8
ISM New Orders (OCT)	01-11-2017	14:00	USD	-	64.6
ISM Prices Paid (OCT)	01-11-2017	14:00	USD	-	71.5
Markit US Manufacturing PMI (OCT F)	01-11-2017	13:45	USD	-	54.5
MBA Mortgage Applications (OCT 27)	01-11-2017	11:00	USD	-	(0.046)

..... End of Report

