



02 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,638	0.2 %	4.3 %
BSE SENSEX	31,138	(0.0) %	4.4 %
CNX BANK	23,314	0.0 %	8.2 %
CNX MIDCAP	17,673	0.3 %	2.0 %
CNX SMALLCAP	7,285	0.2 %	3.0 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,144	0.7 %	6.3 %
S&P 500	2,430	0.8 %	7.6 %
FTSE 100	7,544	0.3 %	5.1 %
HANG SENG	25,809	0.6 %	16.5 %
NIKKEI	19,860	1.1 %	1.4 %
SHANGHAI COMPOSITE	3,103	(0.5) %	(1.1) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.48	(0.1) %	(4.4) %
EUR/USD	1.12	(0.3) %	5.8 %
GBP/USD	1.29	(0.0) %	4.7 %
USD/JPY	111.61	0.6 %	(3.8) %
USD/AUD	1.35	0.2 %	(1.0) %
USD/SGD	1.39	0.1 %	(3.1) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	48	0.1 %	(7.6) %
Gold(INR/10g)	28,828	(0.0) %	3.7 %
Gold Comex(USD/oz)	1,263	(0.8) %	9.1 %
SILVER(INR/1Kg)	39,370	(0.8) %	1.2 %
Aluminium(USD/MT)	1,930	0.5 %	13.4 %
Copper(USD/MT)	5,637	0.4 %	1.1 %

**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:** A report released by the Institute for Supply Management on Thursday showed activity in the US manufacturing sector unexpectedly grew at a slightly faster rate in the month of May. The ISM said its purchasing managers index (ISM) inched up to 54.9 in May from 54.8 in April. China's manufacturing sector contracted for the first time in nearly a year in May. The Caixin factory PMI fell to 49.6 in May from 50.3 in April. The UK PMI fell to 56.7 in May from April's three-year high of 57.3.

**Global Equities:** US stocks edged higher over the course of the trading session on Thursday, offsetting the weakness seen in the two previous sessions. With the advance on the day, the three major averages reached new record closing highs.

**Indian Economy:** India's manufacturing activity expanded at a slower pace in May, survey data from IHS Markit showed Thursday. The Nikkei manufacturing PMI fell to a three-month low of 51.6 in May from 52.5 in April. Nonetheless, the score above the neutral 50 indicates expansion. Data showed that rates of increase eased in both new orders and output. International demand for Indian goods also deteriorated in May. Amid reports of the non-replacement of voluntary leavers and shortages of suitable labor, manufacturing jobs in India decreased in May. On the price front, survey revealed that input costs rose at the slowest rate since last September, whereas charge inflation accelerated in May.

**Equity Markets:** Local stocks ended a flat trading session on a flat note. Key indices traded on a lackluster note throughout the trading session with their movement restricted to a narrow range around the flat line. Asian stocks witnessed a mixed trend after weaker-than-expected Caixin manufacturing PMI data.

**Corporate News:** Hero MotoCorp (HMCL) said its total two-wheeler sales grew 8.7% to 6.33 lakh units in May 2017 over May 2016. The announcement was made after market hours yesterday, 1 June 2017. With monsoon already hitting some parts of the country, and forecast of normal rains this year, the industry is expecting a boost in demand and consumption in the rural markets. Having lined up a slew of new launches across various segments, the company is confident of maintaining the growth trajectory in the coming months. Bharti Airtel announced that it has received the approval of the Securities and Exchange Board of India (Sebi), BSE and National Stock Exchange of India (NSE) for the proposed Scheme of merger between Airtel and Telenor (India) Communications. Coal India announced that the company and its subsidiaries achieved 92% of targeted production at 40.74 million tonnes in May 2017. The company achieved 91% of targeted offtake at 46.41 million tonnes in May 2017.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	175.4	73.5	30.7
MF(INR cr)	355.9	453.5	530.5

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	26,849	26,849	30,550
F&O(INR cr)	827,706	827,706	540,702

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	9.9	9.9	11.9
NSE VIX	11.3	11.3	11.4

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	23,310	(0.5) %	8.2 %	Energy	11,797	(1.1) %	(0.2) %
IT	10,575	0.2 %	(0.2) %	Pharma	9,105	0.9 %	(13.3) %
Metals	2,927	(0.9) %	(5.8) %	Finance	9,475	(0.4) %	7.4 %
Auto	10,892	0.2 %	9.8 %	PSU	3,519	0.1 %	(0.2) %
FMCG	26,166	1.3 %	10.7 %	Real Estate	251	0.1 %	14.4 %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Divi's Lab	602	3.4 %	(4.0) %	I O C L	414	(3.6) %	8.6 %
Glenmark P	658	3.3 %	(23.3) %	Ashok Leyl	91	(3.6) %	8.3 %
Adani Port	349	3.0 %	2.1 %	Vedanta	231	(3.1) %	(15.2) %
Piramal En	2,816	3.0 %	45.5 %	H P C L	541	(2.3) %	4.4 %
Hind. Unil	1,095	2.7 %	19.0 %	Power Fin.	131	(2.2) %	(11.5) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
HIA New Home Sales (MoM) (APR)	02-06-2017	1:00	AUD	-	(0.011)
International Merchandise Trade (Canadian dollar) (APR)	02-06-2017	12:30	CAD	-	-
Labor Productivity (QoQ) (1Q)	02-06-2017	12:30	CAD	-	0.004
Euro-Zone Producer Price Index (MoM) (APR)	02-06-2017	9:00	EUR	-	(0.003)
Euro-Zone Producer Price Index (YoY) (APR)	02-06-2017	9:00	EUR	-	0.039
Markit/CIPS UK Construction PMI (MAY)	02-06-2017	8:30	GBP	-	53.1
Consumer Confidence Index (MAY)	02-06-2017	5:00	JPY	-	43.2
Average Hourly Earnings (MoM) (MAY)	02-06-2017	12:30	USD	-	0.003
Average Hourly Earnings (YoY) (MAY)	02-06-2017	12:30	USD	-	0.025
Average Weekly Hours All Employees (MAY)	02-06-2017	12:30	USD	-	34.4
Baker Hughes U.S. Rig Count (2 JUN)	02-06-2017	17:00	USD	-	908
Change in Manufacturing Payrolls (MAY)	02-06-2017	12:30	USD	-	-
Change in Non-farm Payrolls (MAY)	02-06-2017	12:30	USD	-	-
Change in Private Payrolls (MAY)	02-06-2017	12:30	USD	-	-
Fed's Harker Speaks on Economy Outlook	02-06-2017	16:45	USD	-	-
Labor Force Participation Rate (MAY)	02-06-2017	12:30	USD	-	0.629
Revisions: Trade (2014-16 will be revised)	02-06-2017	12:30	USD	-	-
Trade Balance (APR)	02-06-2017	12:30	USD	-	-
Two-Month Payroll Net Revision (MAY)	02-06-2017	12:30	USD	-	-
Underemployment Rate (MAY)	02-06-2017	12:30	USD	-	0.086
Unemployment Rate (MAY)	02-06-2017	12:30	USD	-	0.044

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