



02 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,101	(0.1) %	9.3 %
BSE SENSEX	32,575	0.2 %	8.8 %
CNX BANK	25,130	0.0 %	16.6 %
CNX MIDCAP	18,546	0.2 %	7.0 %
CNX SMALLCAP	7,786	0.2 %	10.1 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,964	0.3 %	10.5 %
S&P 500	2,476	0.2 %	9.7 %
FTSE 100	7,424	0.7 %	3.4 %
HANG SENG	27,540	0.8 %	24.3 %
NIKKEI	20,080	0.5 %	2.5 %
SHANGHAI COMPOSITE	3,293	0.6 %	5.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.08	(0.2) %	(5.0) %
EUR/USD	1.18	(0.3) %	11.3 %
GBP/USD	1.32	(0.2) %	7.3 %
USD/JPY	110.56	0.5 %	(4.7) %
USD/AUD	1.26	1.1 %	(8.0) %
USD/SGD	1.36	0.4 %	(4.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(2.0) %	(6.1) %
Gold(INR/10g)	28,544	0.1 %	2.6 %
Gold Comex(USD/oz)	1,275	(0.1) %	10.2 %
SILVER(INR/1Kg)	38,162	(0.3) %	(2.0) %
Aluminium(USD/MT)	1,887	(0.9) %	10.9 %
Copper(USD/MT)	6,301	(0.7) %	13.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	(0.0) %	(0.2) %

Global Economy: Activity in the US manufacturing sector saw continued growth in the month of July, according to a report released by the Institute for Supply Management on Tuesday, although the pace growth slowed. The ISM said its purchasing managers index dropped to 56.3 in July from 57.8 in June, with a reading above 50 indicating growth in the manufacturing sector. The decrease by the headline index came amid a slowdown in the pace of growth in new orders, as the new orders index fell to 60.4 in July from 63.5 in June. Eurozone expanded at a faster pace in the second quarter as economic activity gained further momentum. Gross domestic product grew 0.6% sequentially, faster than the revised 0.5% increase seen in the first quarter, preliminary flash estimates from Eurostat showed. China's manufacturing activity growth accelerated in July as output and new orders expanded at the fastest rates in five months. The Caixin manufacturing Purchasing Managers' Index rose unexpectedly to 51.1 in July from 50.4 in June.

Global Equities: The Dow Jones Industrials Average finished at an all-time high yesterday but the broader market's gains were hobbled by losses in the technology sector.

Indian Economy: Markit Economics said that the introduction of the goods & services tax (GST) weighed heavily on the Indian manufacturing industry in July. New orders and output decreased for the first time since the demonetisation-related downturn recorded in December last year, with rates of contraction the steepest since February 2009 in both cases. At 47.9 in July, down from 50.9 in June, the Nikkei India Manufacturing Purchasing Managers' Index (PMI) was at its lowest mark since February 2009 and highlighted the first deterioration in business conditions in 2017 so far.

Equity Markets: Key benchmark indices settled with small gains as positive cues from global stocks supported gains on the bourses. Both the Sensex, and the Nifty, hit record closing high. Private survey showing Indian manufacturing activity contracting in July kept gains of indices under check. After opening with a positive bias on firm Asian stocks, key indices traded in a narrow range in positive terrain till morning trade. Indices dropped into the negative terrain in mid-morning trade.

Corporate News: Interest rate sensitive auto, banking and realty stocks will be watched ahead of the Reserve Bank of India's (RBI) monetary policy meeting outcome at 14:30 IST today, 2 August 2017. In June 2017, RBI kept the policy repo rate under the liquidity adjustment facility (LAF) unchanged at 6.25%. Consequently, the reverse repo rate under the LAF remained at 6%, and the marginal standing facility (MSF) rate and the Bank Rate at 6.5%. Hero MotoCorp said its total two-wheeler sales rose 17.1% to 6.23 lakh units in July 2017 over July 2016, despite sluggish sales for the first few days of the month due to the transition to GST. Coal India reported production and offtake figures for July 2017, which were close to their targets for the month. Coal India said that production of the company and its subsidiary companies on provisional basis was 97% of targeted production at 36.64 million tonnes in July 2017. Offtake was 99% of target at 44.33 million tonnes in July 2017. Hindustan Copper will be watched. The government will sell 3.70 crore equity shares, or 4% equity, in Hindustan Copper at a floor price of Rs 64.75 each through a two-day offer-for-sale (OFS) beginning today, 2 August 2017, with an option to issue a similar number of shares in case of over subscription.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(190.1)	18.5	26.7
MF(INR cr)	(169.4)	427.9	473.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,975	28,975	30,322
F&O(INR cr)	341,280	341,280	545,868

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	10.1	11.1
NSE VIX	11.9	11.9	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,123	0.1 %	16.6 %	Energy	12,820	(0.1) %	8.5 %
IT	10,802	0.4 %	2.0 %	Pharma	9,517	0.4 %	(9.4) %
Metals	3,291	0.9 %	6.0 %	Finance	10,263	(0.1) %	16.3 %
Auto	11,171	1.5 %	12.6 %	PSU	3,672	(1.3) %	4.2 %
FMCG	25,782	0.1 %	9.1 %	Real Estate	283	0.0 %	29.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Eicher Mot	31,505	4.7 %	23.3 %	Godrej Con	964	(7.0) %	13.7 %
Tech Mahin	402	4.3 %	(11.2) %	Siemens	1,397	(4.0) %	7.3 %
United Spi	2,644	4.3 %	29.2 %	ICICI Pru	444	(3.3) %	15.2 %
Indiabulls	1,225	4.3 %	23.0 %	Emami	1,072	(3.3) %	2.2 %
Petronet L	212	3.8 %	2.3 %	Punjab Nat	158	(3.0) %	5.0 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Service Index (JUL)	02-08-2017	23:30	AUD	-	54.8
Building Approvals (MoM) (JUN)	02-08-2017	1:30	AUD	-	(0.056)
Building Approvals (YoY) (JUN)	02-08-2017	1:30	AUD	-	(0.197)
Commonwealth Bank Australia PMI Composite (JUL)	02-08-2017	23:00	AUD	-	57.2
Commonwealth Bank Australia PMI Services (JUL)	02-08-2017	23:00	AUD	-	57
Retail Sales (Real) (YoY) (JUN)	02-08-2017	7:15	CHF	-	(0.003)
SECO Consumer Confidence (JUL)	02-08-2017	5:45	CHF	-	(8)
SVME-Purchasing Managers Index (JUL)	02-08-2017	7:30	CHF	-	60.1
Euro-Zone Producer Price Index (MoM) (JUN)	02-08-2017	9:00	EUR	-	(0.004)
Euro-Zone Producer Price Index (YoY) (JUN)	02-08-2017	9:00	EUR	-	0.033
Markit/CIPS UK Construction PMI (JUL)	02-08-2017	8:30	GBP	-	54.8
BOJ Funo speaks in Sapporo	02-08-2017	1:30	JPY	-	-
Consumer Confidence Index (JUL)	02-08-2017	5:00	JPY	-	43.3
ANZ Job Advertisements (MoM) (JUL)	02-08-2017	22:00	NZD	-	0.013
ADP Employment Change (JUL)	02-08-2017	12:15	USD	-	-
DOE Cushing OK Crude Inventory (JUL 28)	02-08-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (JUL 28)	02-08-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (JUL 28)	02-08-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (JUL 28)	02-08-2017	14:30	USD	-	-
Fed's Mester Speaks to Community Banking Conference	02-08-2017	16:00	USD	-	-
Fed's Williams Speaks in Las Vegas on Monetary Policy	02-08-2017	19:30	USD	-	-
MBA Mortgage Applications (JUL 28)	02-08-2017	11:00	USD	-	0.004

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