



03 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,082	(0.3) %	9.1 %
BSE SENSEX	32,477	(0.3) %	8.6 %
CNX BANK	25,055	(0.3) %	16.3 %
CNX MIDCAP	18,518	0.0 %	6.8 %
CNX SMALLCAP	7,744	(0.4) %	9.5 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,016	0.2 %	10.7 %
S&P 500	2,478	0.1 %	9.7 %
FTSE 100	7,411	(0.2) %	3.3 %
HANG SENG	27,607	0.2 %	24.6 %
NIKKEI	20,080	0.5 %	2.5 %
SHANGHAI COMPOSITE	3,285	(0.2) %	4.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.70	(0.8) %	(5.5) %
EUR/USD	1.18	0.1 %	11.7 %
GBP/USD	1.32	(0.0) %	7.5 %
USD/JPY	110.61	0.5 %	(4.6) %
USD/AUD	1.26	1.4 %	(7.8) %
USD/SGD	1.36	0.4 %	(4.9) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(2.0) %	(6.1) %
Gold(INR/10g)	28,467	(0.3) %	2.4 %
Gold Comex(USD/oz)	1,275	(0.1) %	10.2 %
SILVER(INR/1Kg)	37,872	(0.8) %	(2.7) %
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: Employment in the US private sector increased by less than expected in the month of July, according to a report released by payroll processor ADP on Wednesday. ADP said private sector employment climbed by 178,000 jobs in July after jumping by 191,000 jobs in June. Eurozone producer price inflation eased in June on slowing energy price growth, data from Eurostat showed Wednesday. Producer prices climbed 2.5% in June from the previous year, after rising 3.4% in May. This was the slowest inflation seen so far this year.

Global Equities: The Dow Jones Industrial Average breached the 22,000 mark for the first time ever on Wednesday, helped by a rally in Apple's shares.

Indian Economy: On the basis of an assessment of the current and evolving macroeconomic situation, the Monetary Policy Committee (MPC) decided to reduce the policy repo rate under the liquidity adjustment facility (LAF) by 25 basis points from 6.25% to 6.05 with immediate effect. Consequently, the reverse repo rate under the LAF stands adjusted to 5.75%, and the marginal standing facility (MSF) rate and the Bank Rate to 6.25%. The decision of the MPC is consistent with a neutral stance of monetary policy in consonance with the objective of achieving the medium-term target for consumer price index (CPI) inflation of 4% within a band of +/- 2%, while supporting growth.

Equity Markets: Key benchmark indices settled with modest losses as profit booking emerged after the Reserve Bank of India (RBI) cut policy rate by 25 basis points after a monetary policy meet today, 2 August 2017, in line with market expectations. Indices opened higher and hit fresh record highs in early trade tracking firm Asian stocks.

Corporate News: The Minister of Communications Manoj Sinha said that the Indian telecom industry has seen a paradigm shift from a voice centric market to a data-centric market. While voice business still contributes a large chunk towards operator revenues, data revenues have shown an exponential growth trajectory over the last few years. The Minister said that by the end of 2016 the number of internet subscribers in India was 391.50 million making India globally the 2nd highest in terms of internet users. GAIL (India) said it has commenced 100% construction work in Kerala stretch of Kochi - Kootanad - Mangaluru-Bengaluru Pipeline (KKMBPL) project. GAIL started its foray into the state of Kerala with KKMBPL with a total project cost of Rs 3263 crore. Wipro and Tricentis announced a partnership for quality engineering. This partnership with Tricentis will strengthen Wipro's quality engineering and testing services capabilities, by integrating Tricentis Tosca, a continuous testing platform, with Wipro AssureNXT, a managed services QA platform combined with the capabilities of Wipro HOLMES Artificial Intelligence Platform as a part of the broader automaton ecosystem.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(143.6)	(143.6)	24.7
MF(INR cr)	454.5	454.5	472.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	27,141	28,058	30,284
F&O(INR cr)	551,232	446,256	545,932

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	25,055	(0.3) %	16.3 %	Energy	12,923	0.8 %	9.3 %
IT	10,727	(0.7) %	1.3 %	Pharma	9,454	(0.7) %	(10.0) %
Metals	3,284	(0.2) %	5.7 %	Finance	10,219	(0.4) %	15.8 %
Auto	11,134	(0.3) %	12.2 %	PSU	3,659	(0.4) %	3.8 %
FMCG	25,531	(1.0) %	8.0 %	Real Estate	282	(0.2) %	28.9 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
NTPC	172	4.0 %	4.4 %	Godrej Con	920	(4.6) %	8.5 %
Emami	1,105	3.1 %	5.3 %	Colgate-Pa	1,039	(2.9) %	3.2 %
Titan Comp	553	2.5 %	20.3 %	Indiabulls	1,196	(2.4) %	20.1 %
Cummins In	993	2.3 %	3.2 %	B H E L	141	(2.4) %	(15.4) %
Ambuja Cem	267	2.2 %	12.2 %	Dr Reddy's	2,379	(2.2) %	(13.3) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Trade Balance (Australian dollar) (JUN)	03-08-2017	1:30	AUD	-	-
Caixin China PMI Composite (JUL)	03-08-2017	1:45	CNY	-	51.1
Caixin China PMI Services (JUL)	03-08-2017	1:45	CNY	-	51.6
ECB Publishes Economic Bulletin	03-08-2017	8:00	EUR	-	-
Euro-Zone Retail Sales (MoM) (JUN)	03-08-2017	9:00	EUR	-	0.004
Euro-Zone Retail Sales (YoY) (JUN)	03-08-2017	9:00	EUR	-	0.026
Markit Eurozone Composite PMI (JUL F)	03-08-2017	8:00	EUR	-	55.8
Markit Eurozone Services PMI (JUL F)	03-08-2017	8:00	EUR	-	55.4
Markit France Composite PMI (JUL F)	03-08-2017	7:50	EUR	-	55.7
Markit France Services PMI (JUL F)	03-08-2017	7:50	EUR	-	55.9
Markit Germany Services PMI (JUL F)	03-08-2017	7:55	EUR	-	53.5
Markit/ADACI Italy Composite PMI (JUL)	03-08-2017	7:45	EUR	-	54.5
Markit/ADACI Italy Services PMI (JUL)	03-08-2017	7:45	EUR	-	53.6
Markit/BME Germany Composite PMI (JUL F)	03-08-2017	7:55	EUR	-	55.1
Bank of England Inflation Report	03-08-2017	11:00	GBP	-	-
Bank of England Rate Decision (AUG 03)	03-08-2017	11:00	GBP	-	0.0025
BOE Asset Purchase Target (AUG)	03-08-2017	11:00	GBP	-	-
BOE Corporate Bond Target (AUG)	03-08-2017	11:00	GBP	-	-
Markit/CIPS UK Composite PMI (JUL)	03-08-2017	8:30	GBP	-	53.8
Markit/CIPS UK Services PMI (JUL)	03-08-2017	8:30	GBP	-	53.4
Official Reserves (Changes) (JUL)	03-08-2017	8:30	GBP	-	-
Nikkei Japan PMI Composite (JUL)	03-08-2017	0:30	JPY	-	52.9
Nikkei Japan PMI Services (JUL)	03-08-2017	0:30	JPY	-	53.3
ANZ Commodity Price (JUL)	03-08-2017	1:00	NZD	-	0.021
Cap Goods Orders Nondef Ex Air (JUN F)	03-08-2017	14:00	USD	-	(0.001)
Cap Goods Ship Nondef Ex Air (JUN F)	03-08-2017	14:00	USD	-	0.002
Challenger Job Cuts (YoY) (JUL)	03-08-2017	11:30	USD	-	(0.193)
Continuing Claims (JUL 22)	03-08-2017	12:30	USD	-	-
Disposable Goods Orders (JUN F)	03-08-2017	14:00	USD	-	0.065



Durables Ex Transportation (JUN F)	03-08-2017	14:00	USD	-	0.002
EIA Natural Gas Storage Change (JUL 28)	03-08-2017	14:30	USD	-	17
EIA Working Natural Gas Implied Flow (JUL 28)	03-08-2017	14:30	USD	-	17
Factory Orders (JUN)	03-08-2017	14:00	USD	-	(0.008)
Factory Orders Ex Trans (JUN)	03-08-2017	14:00	USD	-	(0.003)
Initial Jobless Claims (JUL 29)	03-08-2017	12:30	USD	-	-
ISM Services/Non-Manufacturing Composite (JUL)	03-08-2017	14:00	USD	-	57.4
Markit US Composite PMI (JUL F)	03-08-2017	13:45	USD	-	54.2
Markit US Services PMI (JUL F)	03-08-2017	13:45	USD	-	54.2

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