



04 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,010	(0.0) %	8.4 %
BSE SENSEX	32,238	(0.7) %	7.6 %
CNX BANK	24,701	0.1 %	14.6 %
CNX MIDCAP	18,296	(0.1) %	5.6 %
CNX SMALLCAP	7,659	(0.1) %	8.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,026	0.0 %	10.8 %
S&P 500	2,472	(0.2) %	9.5 %
FTSE 100	7,475	0.9 %	4.1 %
HANG SENG	27,531	(0.3) %	24.3 %
NIKKEI	19,952	(0.4) %	1.8 %
SHANGHAI COMPOSITE	3,273	(0.4) %	4.4 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.69	(0.0) %	(5.5) %
EUR/USD	1.19	0.3 %	12.0 %
GBP/USD	1.31	(0.6) %	6.8 %
USD/JPY	110.12	(0.5) %	(5.1) %
USD/AUD	1.26	(0.4) %	(8.1) %
USD/SGD	1.36	(0.2) %	(5.0) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	(1.1) %	(6.3) %
Gold(INR/10g)	28,374	(0.3) %	2.0 %
Gold Comex(USD/oz)	1,274	0.4 %	10.1 %
SILVER(INR/1Kg)	37,484	(1.0) %	(3.7) %
Aluminium(USD/MT)	1,892	(0.7) %	11.1 %
Copper(USD/MT)	6,290	(0.2) %	12.8 %

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	(0.1) %	(0.2) %

Global Economy: New orders for US manufactured goods saw a substantial increase in the month of June, the Commerce Department revealed in a report on Thursday. The Commerce Department said factory orders jumped by 3% in June after dipping by a revised 0.3% in May. Activity in the US service sector grew at a notably slower rate in the month of July. The ISM said its non-manufacturing index dropped to 53.9 in July from 57.4 in June. The Eurozone private sector grew at the slowest pace in six months in July, final survey results from IHS Markit showed. The final composite output index fell to 55.7 in July from 56.3 in June. Nonetheless, the headline index has signaled expansion throughout the past 49 months. The expansion was once again broad-based by both sector and nation. The services Purchasing Managers' Index was steady at 55.4 in July.

Global Equities: Stocks showed a lack of direction, extending the lackluster performance seen in the previous session. Despite the choppy trading, the Dow climbed to another new record closing high.

Indian Economy: Banks may require an incremental provisioning of 20% against cumulative debt of 50 large stressed assets worth over Rs.3 lakh crore in construction, power, metals and other sectors that constitute about half of the gross non-performing assets of the banking sector, noted a recent joint study by ASSOCHAM-Crisil. The study also noted that while banks may have already provisioned for a part of these exposures, they need to adequately capitalise to absorb such losses which could fuel credit growth and support the next leg of economic growth.

Equity Markets: Key benchmark indices registered modest losses as private survey showed that India's services activity slumped in July. The Sensex and the Nifty, both, hit their lowest closing level in more than a week. The Nifty 50 index settled slightly above the psychologically important 10,000 mark after falling below that mark for a brief period in late trade. Indices opened higher but soon slipped into the red in early trade on weak Asian stocks.

Corporate News: Infosys announced a definitive agreement to acquire Brilliant Basics, a London-based product design and customer experience (CX) innovator. This acquisition represents Infosys' commitment to the expansion of a worldwide connected network of Digital Studios. These studios are focused on fulfilling the needs of our global clients for end-to-end digital Transformation solutions required to meet customer demand for next-generation enhanced customer experiences. Mahindra & Mahindra (M&M) informed that the loans & investment committee of directors approved selling up to 96.66 lakh equity shares, or 13.74% equity, in Mahindra Logistics (MLL), a subsidiary of M&M, as part of the proposed initial public offering of MLL. Among prominent companies, Dabur India and Mahindra & Mahindra (M&M) will announce April-June 2017 results today, 4 August 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	88.6	(27.5)	25.4
MF(INR cr)	(25.3)	214.6	466.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,656	29,257	30,300
F&O(INR cr)	1,107,707	666,740	552,541

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.4	10.3	11.1
NSE VIX	11.6	11.8	11.3

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,675	(1.5) %	14.5 %	Energy	13,081	1.2 %	10.7 %
IT	10,683	(0.4) %	0.9 %	Pharma	9,337	(1.2) %	(11.1) %
Metals	3,222	(1.9) %	3.7 %	Finance	10,086	(1.3) %	14.3 %
Auto	11,059	(0.7) %	11.5 %	PSU	3,553	(2.9) %	0.8 %
FMCG	25,484	(0.2) %	7.8 %	Real Estate	280	(0.9) %	27.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Godrej Con	970	5.4 %	14.4 %	Punjab Nat	149	(6.1) %	(0.4) %
I O C L	387	4.6 %	1.5 %	Cummins In	949	(4.4) %	(1.3) %
Colgate-Pa	1,083	4.2 %	7.6 %	Lupin	993	(4.0) %	(30.8) %
Power Fin.	126	3.4 %	(14.5) %	S A I L	61	(3.9) %	(3.7) %
Emami	1,141	3.2 %	8.7 %	Coal India	242	(3.6) %	(18.1) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
RBA Statement on Monetary Policy	04-08-2017	1:30	AUD	-	-
Retail Sales Ex Inflation(QoQ) (2Q)	04-08-2017	1:30	AUD	-	0.001
Retail Sales s.a. (MoM) (JUN)	04-08-2017	1:30	AUD	-	0.006
Full Time Employment Change (JUL)	04-08-2017	12:30	CAD	-	8.1
International Merchandise Trade (Canadian dollar) (JUN)	04-08-2017	12:30	CAD	-	-
Ivey Purchasing Managers Index SA (JUL)	04-08-2017	14:00	CAD	-	61.6
Net Change in Employment (JUL)	04-08-2017	12:30	CAD	-	-
Part Time Employment Change (JUL)	04-08-2017	12:30	CAD	-	37.1
Participation Rate (JUL)	04-08-2017	12:30	CAD	-	65.9
Unemployment Rate (JUL)	04-08-2017	12:30	CAD	-	0.065
German Factory Orders n.s.a. (YoY) (JUN)	04-08-2017	6:00	EUR	-	0.037
German Factory Orders s.a. (MoM) (JUN)	04-08-2017	6:00	EUR	-	0.01
Markit Eurozone Retail PMI (JUL)	04-08-2017	8:10	EUR	-	53.2
Markit France Retail PMI (JUL)	04-08-2017	8:10	EUR	-	56.3
Markit Germany Construction PMI (JUL)	04-08-2017	7:30	EUR	-	55.1
Markit Germany Retail PMI (JUL)	04-08-2017	8:10	EUR	-	54.5
Markit Italy Retail PMI (JUL)	04-08-2017	8:10	EUR	-	47.1
New Car Registrations (YoY) (JUL)	04-08-2017	8:00	GBP	-	(0.048)
Labor Cash Earnings (YoY) (JUN)	04-08-2017	0:00	JPY	-	0.007
Real Cash Earnings (YoY) (JUN)	04-08-2017	0:00	JPY	-	0.001
Average Hourly Earnings (MoM) (JUL)	04-08-2017	12:30	USD	-	0.002
Average Hourly Earnings (YoY) (JUL)	04-08-2017	12:30	USD	-	0.025
Average Weekly Hours All Employees (JUL)	04-08-2017	12:30	USD	-	34.5
Baker Hughes U.S. Rig Count (AUG 04)	04-08-2017	17:00	USD	-	958
Change in Manufacturing Payrolls (JUL)	04-08-2017	12:30	USD	-	-
Change in Non-farm Payrolls (JUL)	04-08-2017	12:30	USD	-	-
Change in Private Payrolls (JUL)	04-08-2017	12:30	USD	-	-
Labor Force Participation Rate (JUL)	04-08-2017	12:30	USD	-	0.628
Trade Balance (JUN)	04-08-2017	12:30	USD	-	-



Two-Month Payroll Net Revision (JUL)	04-08-2017	12:30	USD	-	-
Underemployment Rate (JUL)	04-08-2017	12:30	USD	-	0.086
Unemployment Rate (JUL)	04-08-2017	12:30	USD	-	0.044

..... End of Report

