



04 Oct.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,860	0.7 %	6.7 %
BSE SENSEX	31,497	0.7 %	5.3 %
CNX BANK	24,103	0.2 %	11.9 %
CNX MIDCAP	18,201	0.5 %	5.0 %
CNX SMALLCAP	7,631	0.6 %	7.9 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,642	0.4 %	13.9 %
S&P 500	2,535	0.2 %	12.3 %
FTSE 100	7,468	0.4 %	4.0 %
HANG SENG	28,173	2.3 %	27.2 %
NIKKEI	20,614	1.1 %	5.2 %
SHANGHAI COMPOSITE	3,349	0.3 %	6.8 %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	65.50	(0.0) %	(2.9) %
EUR/USD	1.18	(0.0) %	11.1 %
GBP/USD	1.33	(1.1) %	7.9 %
USD/JPY	112.60	0.0 %	(2.9) %
USD/AUD	1.27	(0.3) %	(7.1) %
USD/SGD	1.36	(0.0) %	(5.0) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	51	0.0 %	(3.3) %
Gold(INR/10g)	29,434	(0.9) %	5.8 %
Gold Comex(USD/oz)	1,272	(1.2) %	9.9 %
SILVER(INR/1Kg)	38,821	(1.4) %	(0.3) %
Aluminium(USD/MT)	2,067	(1.7) %	21.4 %
Copper(USD/MT)	6,455	0.8 %	15.8 %

**FIXED INCOME**

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.3	0.0 %	(0.1) %

**Global Economy:** The UK construction sector contracted in September on weak new work, data from IHS Markit showed Tuesday. The IHS Markit/Chartered Institute of Procurement & Supply construction Purchasing Managers' Index fell to 48.1 in September from 51.1 in August. The score was below the 50-change threshold for the first time in 13 months. The latest reading signaled the fastest drop in overall construction output since July 2016. Japan's consumer confidence improved in September, survey data from the Cabinet Office revealed Tuesday. The consumer sentiment index rose to 43.9 from 43.3 in August. The expected reading was 43.5. A similar high score was last seen in March. Australia kept its record low interest rate unchanged. The board of the Reserve Bank of Australia (RBA) maintained the cash rate at 1.50%. The interest rate has been at this level since September 2016.

**Global Equities:** Sentiments were mixed in global markets though the undertone stayed affirmative on record run in US equities.

**Indian Economy:** The combined Index of Eight Core Industries stands at 123.6 in August, 2017, which was 4.9 % higher compared to the index of August, 2016. Its cumulative growth during April to August, 2017-18 was 3.0 %. Coal production increased by 15.3% in August, 2017 over August, 2016. Its cumulative index declined by 0.2% during April to August, 2017-18 over corresponding period of the previous year.

**Equity Markets:** Key benchmark indices logged modest gains on first trading day of the week and ahead of the Reserve Bank of India's decision on monetary policy review. The Nifty 50 index rose 70.90 points or 0.72% to settle at 9,859.50. Firmness in most of the global stocks boosted sentiment on domestic bourses. Key indices gained for the third straight day.

**Corporate News:** India's manufacturing activity recorded a sustained expansion in September, underpinned by increases in both output and new orders, survey figures from IHS Markit showed Tuesday. The Nikkei manufacturing Purchasing Managers' Index, or PMI, came in at 51.2 in September, unchanged from August. A score above 50 indicates expansion in the sector. Manufacturing sector remained in growth zone for the second straight month. Hero MotoCorp said it set a new global benchmark in the two-wheeler industry, surpassing the seven lakh sales mark in any month. The company said its total sales rose 6.78% to 7.20 lakh units in September 2017 over September 2016. The government on Tuesday slashed the excise duty on petrol and diesel by Rs 2 per litre, effective from October 4. This can keep local OMCs in focus today.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	164.8	(78.9)	(12.0)
MF(INR cr)	4,008.3	791.3	610.2

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	29,030	29,030	30,018
F&O(INR cr)	342,860	342,860	588,753

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.5	9.5	11.2
NSE VIX	12.5	12.5	11.8

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,103	0.2 %	11.9 %	Energy	12,945	1.4 %	9.5 %
IT	10,546	0.7 %	(0.4) %	Pharma	9,215	0.5 %	(12.3) %
Metals	3,594	1.2 %	15.7 %	Finance	10,000	0.6 %	13.3 %
Auto	10,904	0.9 %	9.9 %	PSU	3,023	(0.6) %	(14.2) %
FMCG	24,748	1.1 %	4.7 %	Real Estate	274	0.3 %	25.2 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
ICICI Pru	413	6.3 %	7.2 %	Power Grid	206	(2.3) %	5.1 %
Hind.Zinc	313	5.9 %	7.5 %	Idea Cellu	76	(2.0) %	(10.8) %
Tata Motor	233	4.9 %	(17.1) %	Container	1,325	(1.6) %	31.0 %
GAIL (Indi	435	3.9 %	13.2 %	Bharti Air	385	(1.2) %	12.5 %
Godrej Con	954	3.8 %	12.5 %	Cipla	579	(1.2) %	(2.3) %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Euro-Zone Retail Sales (MoM) (AUG)	04-10-2017	09:00	EUR	-	(0.003)
Euro-Zone Retail Sales (YoY) (AUG)	04-10-2017	09:00	EUR	-	0.026
Markit Eurozone Composite PMI (SEP F)	04-10-2017	08:00	EUR	-	56.7
Markit Eurozone Services PMI (SEP F)	04-10-2017	08:00	EUR	-	55.6
Markit France Composite PMI (SEP F)	04-10-2017	07:50	EUR	-	57.2
Markit France Services PMI (SEP F)	04-10-2017	07:50	EUR	-	57.1
Markit Germany Services PMI (SEP F)	04-10-2017	07:55	EUR	-	55.6
Markit/ADACI Italy Composite PMI (SEP)	04-10-2017	07:45	EUR	-	55.8
Markit/ADACI Italy Services PMI (SEP)	04-10-2017	07:45	EUR	-	55.1
Markit/BME Germany Composite PMI (SEP F)	04-10-2017	07:55	EUR	-	57.8
Markit/CIPS UK Composite PMI (SEP)	04-10-2017	08:30	GBP	-	54
Markit/CIPS UK Services PMI (SEP)	04-10-2017	08:30	GBP	-	53.2
Official Reserves (Changes) (SEP)	04-10-2017	08:30	GBP	-	-
BOJ Outright Bond Purchase 1~3 Years	04-10-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	04-10-2017	01:10	JPY	-	-
BOJ Outright Bond Purchase 5~10 Years	04-10-2017	01:10	JPY	-	-
Foreign Buying Japan Bonds (Yen) (SEP 29)	04-10-2017	23:50	JPY	-	-
Foreign Buying Japan Stocks (Yen) (SEP 29)	04-10-2017	23:50	JPY	-	-
Japan Buying Foreign Bonds (Yen) (SEP 29)	04-10-2017	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (SEP 29)	04-10-2017	23:50	JPY	-	-
Nikkei Japan PMI Composite (SEP)	04-10-2017	00:30	JPY	-	51.9
Nikkei Japan PMI Services (SEP)	04-10-2017	00:30	JPY	-	51.6
ANZ Commodity Price (SEP)	04-10-2017	00:00	NZD	-	(0.008)
ADP Employment Change (SEP)	04-10-2017	12:15	USD	-	-
DOE Cushing OK Crude Inventory (SEP 29)	04-10-2017	14:30	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 29)	04-10-2017	14:30	USD	-	-
DOE U.S. Distillate Inventory (SEP 29)	04-10-2017	14:30	USD	-	-
DOE U.S. Gasoline Inventories (SEP 29)	04-10-2017	14:30	USD	-	-
ISM Services (New Manufacturing Composite) (SEP)	04-10-2017	14:00	USD	-	55.2



Markit US Composite PMI (SEP F)	04-10-2017	13:45	USD	-	54.6
Markit US Services PMI (SEP F)	04-10-2017	13:45	USD	-	55.1
MBA Mortgage Applications (SEP 29)	04-10-2017	11:00	USD	-	(0.005)
Yellen Gives Welcoming Remarks at Community Banking Event	04-10-2017	19:15	USD	-	-

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