



05 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,944	0.3 %	7.6 %
BSE SENSEX	31,702	(0.6) %	6.4 %
CNX BANK	24,375	0.6 %	13.1 %
CNX MIDCAP	18,524	0.9 %	6.9 %
CNX SMALLCAP	7,868	1.0 %	11.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,988	0.2 %	10.6 %
S&P 500	2,477	0.2 %	9.7 %
FTSE 100	7,411	(0.4) %	3.3 %
HANG SENG	27,740	(0.8) %	25.2 %
NIKKEI	19,508	(0.9) %	(0.4) %
SHANGHAI COMPOSITE	3,380	0.4 %	7.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.05	0.0 %	(5.0) %
EUR/USD	1.19	0.3 %	12.3 %
GBP/USD	1.29	(0.2) %	5.1 %
USD/JPY	109.54	(0.6) %	(5.6) %
USD/AUD	1.25	(0.1) %	(8.4) %
USD/SGD	1.36	(0.1) %	(5.2) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	0.0 %	(9.6) %
Gold(INR/10g)	30,165	1.4 %	8.5 %
Gold Comex(USD/oz)	1,341	0.8 %	15.9 %
SILVER(INR/1Kg)	40,616	2.1 %	4.4 %
Aluminium(USD/MT)	2,096	(0.9) %	23.1 %
Copper(USD/MT)	6,873	1.4 %	23.3 %

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 %	(0.3) %

Global Economy: Eurozone investor confidence improved unexpectedly in September, survey results from think tank Sentix showed Monday. The investor confidence index rose to 28.2 in September from 27.7 in August. The current situation index fell to 39.75 from 40.0 in the previous month, while the expectations index rose to 17.3 from 16.0. UK construction activity growth eased to a one year low in August, survey data from IHS Markit showed. The Chartered Institute of Procurement & Supply/Markit construction Purchasing Managers' Index fell more-than-expected to 51.1 in August from 51.9 in July.

Global Equities: US stocks extended recent moves showing decent buying support despite the North Korea worries as commodities remained firm. The DOW managed to hover around the key 22000 levels.

Indian Economy: The Petroleum Planning and Analysis Cell (PPAC) under the Ministry of Petroleum and Natural Gas have reviewed international prices of crude oil and petroleum products for the month of August 2017. In the case of PDS Kerosene, the under-recoveries with effect from September 1, 2017 will be Rs7.79 per litre. The under-recovery was Rs. 7.02 per litre in the first fortnight of August 2017 and Rs. 6.77 in the last fortnight of the month. The cash transfer to customer under DBTL will be Rs.110.32, out of which Rs. 95.11 will be Cash Compensation on Domestic LPG by Govt. to consumers & Rs15.21 will be the Cash compensation on Domestic LPG by OMCs towards 'Uncompensated Costs' to consumers.

Equity Markets: Key benchmark indices logged modest losses on first trading day of the week led by slide in Infosys and HDFC Bank. Domestic stocks fell for the first time in four trading days, in tandem with their global counterparts, on rising geo-political tensions between North Korea and the US. Trading for the week had begun on a subdued note as the key benchmark indices edged lower in early trade on negative Asian stocks. Stocks hovered with small losses till mid-morning trade. Indices languished in the red after extending losses and hitting fresh intraday low in early afternoon trade triggered by weak European stocks.

Corporate News: RBI has included HDFC Bank in the list of 'too big to fail' lenders, referred to as D-SIB or domestic systemically important bank. India's largest lender SBI and private sector major ICICI Bank were classified as D-SIBs in 2015. The Supreme Court stayed insolvency proceedings against real estate firm Jaypee Infratech at the National Company Law Tribunal (NCLT), and sought the firm's response on a plea seeking protection of the interests of hassled home buyers who have neither got homes nor their money back. Global Copper futures soared more than 1%, hitting a fresh 3 year high. This should keep local metals and mining stocks elevated in local markets.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(116.5)	(116.5)	0.8
MF(INR cr)	719.2	843.8	575.0

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	28,227	29,443	30,281
F&O(INR cr)	469,922	398,182	576,165

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	10.1	11.3
NSE VIX	13.2	12.4	11.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,237	(0.8) %	12.5 %	Energy	13,164	(0.4) %	11.4 %
IT	10,442	(0.7) %	(1.4) %	Pharma	9,070	(0.0) %	(13.6) %
Metals	3,548	0.1 %	14.2 %	Finance	10,036	(0.7) %	13.7 %
Auto	10,738	(0.8) %	8.2 %	PSU	3,283	(0.4) %	(6.9) %
FMCG	25,761	(0.6) %	9.0 %	Real Estate	283	(1.7) %	29.1 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Sun TV Net	807	5.1 %	1.5 %	I O C L	429	(4.3) %	12.6 %
Shriram Tr	1,071	5.0 %	(3.0) %	Rural Elec	164	(3.1) %	(8.6) %
Oil India	308	4.5 %	(6.6) %	Piramal En	2,692	(2.7) %	39.0 %
Coal India	247	3.3 %	(16.4) %	ACC	1,771	(2.6) %	21.1 %
Oracle Fin	3,582	3.1 %	(5.4) %	Adani Port	385	(2.5) %	12.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Current Account Balance (Australian Dollar) (2Q)	05-09-2017	01:30	AUD	-	-
Net Exports of GDP (2Q)	05-09-2017	01:30	AUD	-	(0.7)
RBA Governor Lowe's Remarks at Board Dinner	05-09-2017	09:10	AUD	-	-
Reserve Bank of Australia Rate Decision (SEP 05)	05-09-2017	04:30	AUD	-	0.015
Consumer Price Index (MoM) (AUG)	05-09-2017	07:15	CHF	-	(0.003)
Consumer Price Index (YoY) (AUG)	05-09-2017	07:15	CHF	-	0.003
CPI EU Harmonized (MoM) (AUG)	05-09-2017	07:15	CHF	-	0.001
CPI EU Harmonized (YoY) (AUG)	05-09-2017	07:15	CHF	-	0.006
Gross Domestic Product (QoQ) (2Q)	05-09-2017	05:45	CHF	-	0.003
Gross Domestic Product (YoY) (2Q)	05-09-2017	05:45	CHF	-	0.011
Caixin China PMI Composite (AUG)	05-09-2017	01:45	CNY	-	51.9
Caixin China PMI Services (AUG)	05-09-2017	01:45	CNY	-	51.5
Euro-Zone Retail Sales (MoM) (JUL)	05-09-2017	09:00	EUR	-	0.005
Euro-Zone Retail Sales (YoY) (JUL)	05-09-2017	09:00	EUR	-	0.031
Markit Eurozone Composite PMI (AUG F)	05-09-2017	08:00	EUR	-	55.8
Markit Eurozone Services PMI (AUG F)	05-09-2017	08:00	EUR	-	54.9
Markit France Composite PMI (AUG F)	05-09-2017	07:50	EUR	-	55.6
Markit France Services PMI (AUG F)	05-09-2017	07:50	EUR	-	55.5
Markit Germany Services PMI (AUG F)	05-09-2017	07:55	EUR	-	53.4
Markit/ADACI Italy Composite PMI (AUG)	05-09-2017	07:45	EUR	-	56.2
Markit/ADACI Italy Services PMI (AUG)	05-09-2017	07:45	EUR	-	56.3
Markit/BME Germany Composite PMI (AUG F)	05-09-2017	07:55	EUR	-	55.7
Markit/CIPS UK Composite PMI (AUG)	05-09-2017	08:30	GBP	-	54.1
Markit/CIPS UK Services PMI (AUG)	05-09-2017	08:30	GBP	-	53.8
New Car Registrations (YoY) (AUG)	05-09-2017	08:00	GBP	-	(0.093)
Official Reserves (Changes) (AUG)	05-09-2017	08:30	GBP	-	-
Labor Cash Earnings (YoY) (JUL)	05-09-2017	00:00	JPY	-	(0.004)
Nikkei Japan PMI Composite (AUG)	05-09-2017	00:30	JPY	-	51.8
ANZ Composite Index (AUG)	05-09-2017	01:00	NZD	-	(0.000)



ANZ Job Advertisements (MoM) (AUG)	05-09-2017	22:00	NZD	-	(0.01)
Cap Goods Orders Nondef Ex Air (JUL F)	05-09-2017	14:00	USD	-	0.004
Cap Goods Ship Nondef Ex Air (JUL F)	05-09-2017	14:00	USD	-	0.01
Durable Goods Orders (JUL F)	05-09-2017	14:00	USD	-	(0.068)
Durables Ex Transportation (JUL F)	05-09-2017	14:00	USD	-	0.005
Factory Orders (JUL)	05-09-2017	14:00	USD	-	0.03
Factory Orders Ex Trans (JUL)	05-09-2017	14:00	USD	-	(0.002)
Fed's Brainard Speaks on Economic Outlook and Monetary Policy	05-09-2017	11:30	USD	-	-
Fed's Kaplan Speaks in Dallas	05-09-2017	23:00	USD	-	-
Fed's Kashkari Holds Townhall Event in Minneapolis	05-09-2017	17:10	USD	-	-
Fed's Kashkari Speaks at University of Minnesota	05-09-2017	16:30	USD	-	-
U.S. to Sell USD20 Bln 4-Week Bills	05-09-2017	17:00	USD	-	-
U.S. to Sell USD25 Bln 8-Day Cash Management Bill	05-09-2017	17:00	USD	-	-
U.S. to Sell USD33 Bln 6-Month Bills	05-09-2017	15:30	USD	-	-
U.S. to Sell USD39 Bln 3-Month Bills	05-09-2017	15:30	USD	-	-

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