



05 Oct.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,915	0.0 %	7.3 %
BSE SENSEX	31,672	0.6 %	5.9 %
CNX BANK	24,113	0.0 %	11.9 %
CNX MIDCAP	18,263	0.0 %	5.4 %
CNX SMALLCAP	7,690	0.0 %	8.7 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,662	0.1 %	14.0 %
S&P 500	2,538	0.1 %	12.4 %
FTSE 100	7,468	(0.0) %	4.0 %
HANG SENG	28,379	0.7 %	28.1 %
NIKKEI	20,627	0.1 %	5.3 %
SHANGHAI COMPOSITE	3,349	0.3 %	6.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	65.01	(0.4) %	(3.6) %
EUR/USD	1.18	(0.5) %	10.9 %
GBP/USD	1.32	(1.2) %	7.7 %
USD/JPY	112.77	(93.1) %	(2.8) %
USD/AUD	1.28	0.0 %	(6.7) %
USD/SGD	1.36	0.4 %	(4.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	(0.3) %	(3.6) %
Gold(INR/10g)	29,428	(0.0) %	5.8 %
Gold Comex(USD/oz)	1,278	0.5 %	10.5 %
SILVER(INR/1Kg)	38,975	0.4 %	0.1 %
Aluminium(USD/MT)	2,115	2.3 %	24.2 %
Copper(USD/MT)	6,447	(0.1) %	15.7 %

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: Activity in the US service sector hit a 13 year high in the month of September, the Institute for Supply Management (ISM) revealed in a report on Wednesday. The ISM said its non-manufacturing index jumped to 59.8 in September from 55.3 in August. Employment in the US private sector climbed by slightly more than anticipated in the month of September, according to a report released by payroll processor ADP on Wednesday. ADP said private sector employment rose by 135,000 jobs in September after soaring by 228,000 jobs in August. The euro area private sector ended the third quarter strongly as output growth accelerated to a four-month high, underpinned by new orders in September, final data from IHS Markit showed Wednesday. The composite output index rose to 56.7 in September from 55.7 a month ago. The score was in line with the preliminary estimate.

Global Equities: US stocks saw a relatively lackluster performance but managed to end the day modestly higher. With the gains on the day, the major averages hit new record closing highs.

Indian Economy: The Reserve Bank of India (RBI) has kept the key interest rates unchanged. Repo rate - the rate at which the central bank lends short-term money to banks- was steady at 6%. The RBI had cut repo rate by 25 basis points (bps) in August. The decision of the Monetary Policy Committee (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, RBI noted in its fourth policy review of 2017-18. However, the bank cut the statutory liquidity ratio (SLR) by 50 basis points to 19.5% with effect from October 14.

Equity Markets: Key benchmark indices logged modest gains in steady session of trade after the Reserve Bank of India (RBI) kept the policy repo rate unchanged at 6% as expected. Data showing good growth in infrastructure output in August boosted sentiment. Key indices gained for the fourth straight day. The Sensex and the Nifty, both, hit their highest closing level in almost two-weeks.

Corporate News: Shares of Prataap Snacks will be listed on the bourses today, 5 October 2017. The issue price has been fixed at Rs 938 per share, the upper end of the Rs 930-938 per share price band. The initial public offer (IPO) of Prataap Snacks received spectacular response from investors. The IPO was oversubscribed 47.39 times. Wipro announced that it has signed a definitive agreement to acquire Cooper, an award-winning design and business strategy consultancy. Cooper will become part of Designit, Wipro Digital's strategic design arm, further strengthening its design and innovation capabilities, expanding its reach in North America and adding capabilities in professional design education. The acquisition is subject to customary closing conditions and is expected to be closed in the third quarter of fiscal 2017-18. ICICI Bank said that the committee of executive directors of the bank approved the allotment of 4,750 Basel III compliant unsecured subordinated perpetual additional Tier 1 bonds aggregating Rs 475 crore on private placement basis. The notes carry a coupon of 8.55% per annum payable annually and were issued at par. NMDC said that it has reduced prices of lump iron ore and fine iron ore by Rs 100 each to Rs 2,300 per ton and Rs 2,060 per ton respectively, with effect from 5 October 2017.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(66.7)	(66.7)	(12.4)
MF(INR cr)	1,631.0	831.3	618.4

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	26,277	27,654	29,988
F&O(INR cr)	560,254	451,557	588,527

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	9.5	9.5	11.1
NSE VIX	11.8	12.1	11.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,113	0.0 %	11.9 %	Energy	13,161	1.7 %	11.3 %
IT	10,540	(0.1) %	(0.5) %	Pharma	9,372	1.7 %	(10.8) %
Metals	3,588	(0.2) %	15.5 %	Finance	10,001	0.0 %	13.3 %
Auto	10,943	0.4 %	10.3 %	PSU	3,040	0.6 %	(13.8) %
FMCG	25,105	1.4 %	6.2 %	Real Estate	276	0.5 %	25.8 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Cadila Hea	494	4.3 %	11.5 %	Idea Cellu	74	(2.2) %	(12.8) %
Sun Pharma	518	3.0 %	(25.2) %	United Spi	2,399	(2.2) %	17.2 %
Tata Motor	239	2.7 %	(14.8) %	Bharti Air	377	(1.9) %	10.3 %
Reliance I	819	2.6 %	19.1 %	Motherson	336	(1.3) %	34.0 %
Aurobindo	725	2.5 %	6.1 %	Shriram Tr	1,048	(1.2) %	(5.0) %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (SEP)	05-10-2017	22:30	AUD	-	55.3
Retail Sales s.a. (MoM) (AUG)	05-10-2017	00:30	AUD	-	0
Trade Balance (Australian dollar) (AUG)	05-10-2017	00:30	AUD	-	-
International Merchandise Trade (Canadian dollar) (AUG)	05-10-2017	12:30	CAD	-	-
Consumer Price Index (MoM) (SEP)	05-10-2017	07:15	CHF	-	0
Consumer Price Index (YoY) (SEP)	05-10-2017	07:15	CHF	-	0.005
CPI EU Harmonized (MoM) (SEP)	05-10-2017	07:15	CHF	-	(0.001)
CPI EU Harmonized (YoY) (SEP)	05-10-2017	07:15	CHF	-	0.005
KOF Institute Autumn Economic Forecast	05-10-2017	08:00	CHF	-	-
ECB account of the monetary policy meeting	05-10-2017	11:30	EUR	-	-
ECB's Coeure is chairing a panel in Frankfurt	05-10-2017	12:15	EUR	-	-
ECB's Praet chairs a panel with Liikanen, Jazbec in Frankfurt	05-10-2017	08:30	EUR	-	-
Markit Eurozone Retail PMI (SEP)	05-10-2017	08:10	EUR	-	50.8
Markit France Retail PMI (SEP)	05-10-2017	08:10	EUR	-	50.4
Markit Germany Construction PMI (SEP)	05-10-2017	07:30	EUR	-	54.9
Markit Germany Retail PMI (SEP)	05-10-2017	08:10	EUR	-	53
Markit Italy Retail PMI (SEP)	05-10-2017	08:10	EUR	-	48
BOE's Haldane Speaks in London	05-10-2017	17:30	GBP	-	-
BOE's McCafferty Speaks in London	05-10-2017	16:00	GBP	-	-
New Car Registrations (YoY) (SEP)	05-10-2017	08:00	GBP	-	(0.064)
Official Reserve Assets (SEP)	05-10-2017	23:50	JPY	-	-
Cap Goods Orders Nondef Ex Air (AUG F)	05-10-2017	14:00	USD	-	0.009
Cap Goods Ship Nondef Ex Air (AUG F)	05-10-2017	14:00	USD	-	0.007
Challenger Job Cuts (YoY) (SEP)	05-10-2017	11:30	USD	-	0.051
Continuing Claims (SEP 23)	05-10-2017	12:30	USD	-	-
Durable Goods Orders (AUG F)	05-10-2017	14:00	USD	-	0.017
Durables Ex Transportation (AUG F)	05-10-2017	14:00	USD	-	0.002
EIA Natural Gas Storage Change (SEP 29)	05-10-2017	14:30	USD	-	58
EIA Working Natural Gas Inventory (SEP 29)	05-10-2017	14:30	USD	-	58



Factory Orders (AUG)	05-10-2017	14:00	USD	-	(0.033)
Factory Orders Ex Trans (AUG)	05-10-2017	14:00	USD	-	0.005
Fed's George Speaks at Workforce Conference	05-10-2017	20:30	USD	-	-
Fed's Harker Speaks at Workforce Conference	05-10-2017	14:00	USD	-	-
Fed's Powell Speaks on Treasury Markets and the TMPG	05-10-2017	13:10	USD	-	-
Fed's Williams Speaks at Community Banking Conference	05-10-2017	13:15	USD	-	-
Initial Jobless Claims (SEP 30)	05-10-2017	12:30	USD	-	-
Trade Balance (AUG)	05-10-2017	12:30	USD	-	-

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