



06 Jun.2017

**INDEX PERFORMANCE**

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,668	(0.1) %	4.7 %
BSE SENSEX	31,309	0.1 %	4.6 %
CNX BANK	23,444	(0.1) %	8.8 %
CNX MIDCAP	17,813	(0.1) %	2.8 %
CNX SMALLCAP	7,342	(0.1) %	3.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,184	(0.1) %	6.6 %
S&P 500	2,436	(0.1) %	7.9 %
FTSE 100	7,526	(0.3) %	4.8 %
HANG SENG	25,863	(0.2) %	16.8 %
NIKKEI	20,171	(0.0) %	2.9 %
SHANGHAI COMPOSITE	3,092	(0.5) %	(1.4) %

**FOREX RATES**

	LATEST	% 1D	% YTD
USD/INR	64.36	(0.1) %	(4.5) %
EUR/USD	1.13	(0.1) %	6.3 %
GBP/USD	1.29	0.2 %	5.0 %
USD/JPY	110.04	(0.3) %	(5.1) %
USD/AUD	1.33	(0.6) %	(2.4) %
USD/SGD	1.38	0.0 %	(3.4) %

**COMMODITIES**

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	47	(0.5) %	(9.4) %
Gold(INR/10g)	29,081	1.1 %	4.6 %
Gold Comex(USD/oz)	1,287	0.4 %	11.2 %
SILVER(INR/1Kg)	40,143	1.9 %	3.1 %
Aluminium(USD/MT)	1,918	0.1 %	12.7 %
Copper(USD/MT)	5,587	0.5 %	0.2 %

**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:** Reflecting a pullback in orders for durable goods, the Commerce Department released a report on Monday showing a modest drop in new orders for U.S. manufactured goods in the month of April. The report said factory orders edged down by 0.2%. After reporting a notable acceleration in the pace of growth in activity in the US service sector in the previous month, the Institute for Supply Management released a report on Monday showing a modest slowdown in the pace of growth in the sector in the month of May. The ISM said its non-manufacturing index edged down to 56.9 in May from 57.5 in April, although a reading above 50 indicates continued growth in the service sector.

**Global Equities:** US stocks showed a lack of direction after hitting record highs. The major averages spent the day bouncing back and forth across the unchanged line before closing modestly lower.

**Indian Economy:** The Indian service sector recovered some recent lost ground, with a quicker rise in new business inflows boosting growth of both activity and employment during May. Input costs and output charges increased at softer rates that were broadly negligible in the context of historical PMI data. Meanwhile, business sentiment weakened on the back of growing concerns regarding competitive pressures. Rising from 50.2 in April to 52.2 in May, the seasonally adjusted Nikkei India Services PMI Business Activity Index pointed to the fastest increase in output in the current four-month sequence of expansion. The headline number was, however, indicative of a moderate pace of growth that was below the series average (54.8).

**Equity Markets:** Key benchmark indices settled with small gains after a range-bound session of trade. Bank stocks were mixed. Interest rate sensitive realty stocks rose ahead of the Reserve Bank of India's monetary policy review later this week. Reliance Communications (RCom) rose after the company said its creditors have allowed the company to postpone debt servicing payments till December 2017. Key indices gained for the second day in a row. Both the Sensex, and the Nifty, had hit fresh record high on intraday and closing basis.

**Corporate News:** Grasim Industries will be watched. The company said that the National Company Law Tribunal (NCLT), bench at Ahmedabad, approved of the merger of Aditya Birla Nuvo (ABNL) and Grasim Industries to be followed by the listing of Aditya Birla Financial Services (ABFSL). State Bank of India (SBI) has reportedly raised Rs 15000 crore from domestic and foreign institutional investors through qualified institutional placement (QIP) of shares. The IPO closed today, 6 June 2017, morning and is believed to have received demand in excess of Rs 20000 crore, media reported. SBI announced after market hours yesterday, 5 June 2017, that the meeting of the committee of directors will be held on Thursday, 8 June 2017, to consider and approve the issue price for the equity shares under the QIP. The floor price of the QIP was fixed at Rs 287.58 each for a face value of Re 1 each. The bank said in a statement that it may offer a discount of not more than 5% to the floor price. Wipro issued clarification to the stock exchanges regarding media news item titled "Wipro promoters in early stage of evaluating sale of part or whole business. The company said that the news article is baseless and malicious. There is no truth to these unsubstantiated rumors, it added.



## FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	17.6	(26.2)	27.9
MF(INR cr)	355.9	453.5	530.5

## MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	24,006	25,413	30,277
F&O(INR cr)	262,868	445,840	527,409

## MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	10.1	9.9	11.8
NSE VIX	11.0	11.0	11.4

## NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	23,460	0.4 %	8.9 %	Energy	11,806	0.4 %	(0.1) %
IT	10,660	0.5 %	0.6 %	Pharma	9,230	(0.3) %	(12.1) %
Metals	2,906	(0.6) %	(6.4) %	Finance	9,533	0.2 %	8.0 %
Auto	10,968	0.2 %	10.6 %	PSU	3,531	0.1 %	0.1 %
FMCG	26,431	0.1 %	11.8 %	Real Estate	256	0.8 %	16.8 %

## NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Titan Comp	552	17.0 %	20.1 %	JSW Steel	191	(2.2) %	0.8 %
United Spi	2,485	6.0 %	21.4 %	Petronet L	437	(2.1) %	5.5 %
Shree Ceme	18,635	3.7 %	8.5 %	Power Fin.	126	(1.7) %	(15.0) %
Indiabulls	1,170	3.4 %	17.5 %	Coal India	265	(1.6) %	(10.3) %
Yes Bank	1,524	2.8 %	(1.0) %	UltraTech	4,178	(1.5) %	3.8 %

## EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Construction Index (MAY)	06-06-2017	23:30	AUD	-	51.9
Current Account Balance (Australian Dollar) (1Q)	06-06-2017	1:30	AUD	-	-
Net Exports of GDP (1Q)	06-06-2017	1:30	AUD	-	0.2
Reserve Bank of Australia Rate Decision (JUN 06)	06-06-2017	4:30	AUD	-	0.015
Ivey Purchasing Managers Index SA (MAY)	06-06-2017	14:00	CAD	-	62.4
Domestic Sight Deposits CHF (JUN 02)	06-06-2017	8:00	CHF	-	-
Total Sight Deposits CHF (JUN 02)	06-06-2017	8:00	CHF	-	-
Euro-Zone Retail Sales (MoM) (APR)	06-06-2017	9:00	EUR	-	0.003
Euro-Zone Retail Sales (YoY) (APR)	06-06-2017	9:00	EUR	-	0.023
Euro-Zone Sentix Investor Confidence (JUN)	06-06-2017	8:30	EUR	-	27.4
Labor Cash Earnings (YoY) (APR)	06-06-2017	0:00	JPY	-	(0.004)
Official Reserve Assets (MAY)	06-06-2017	23:50	JPY	-	-
Real Cash Earnings (YoY) (APR)	06-06-2017	0:00	JPY	-	(0.008)
ANZ Commodity Price (MAY)	06-06-2017	1:00	NZD	-	(0.002)
ANZ Job Advertisements (MoM) (MAY)	06-06-2017	22:00	NZD	-	0.004
Manufacturing Activity (1Q)	06-06-2017	22:45	NZD	-	0.008
Mfg Activity Volume (QoQ) (1Q)	06-06-2017	22:45	NZD	-	(0.018)
JOLTS Job Openings (APR)	06-06-2017	14:00	USD	-	5743
U.S. to Sell 4-Week Bills	06-06-2017	15:30	USD	-	-

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