



07 Jul.2017

**INDEX PERFORMANCE**

| INDIAN INDICES | LATEST | % 1D  | % YTD |
|----------------|--------|-------|-------|
| CNX NIFTY      | 9,675  | 0.4 % | 4.7 % |
| BSE SENSEX     | 31,369 | 0.4 % | 4.9 % |
| CNX BANK       | 23,467 | 0.5 % | 8.9 % |
| CNX MIDCAP     | 18,081 | 0.2 % | 4.3 % |
| CNX SMALLCAP   | 7,498  | 0.4 % | 6.0 % |

| GLOBAL INDICES     | LATEST | % 1D    | % YTD  |
|--------------------|--------|---------|--------|
| DOW JONES          | 21,320 | (0.7) % | 7.2 %  |
| S&P 500            | 2,410  | (0.9) % | 6.7 %  |
| FTSE 100           | 7,337  | (0.4) % | 2.2 %  |
| HANG SENG          | 25,465 | (0.2) % | 15.0 % |
| NIKKEI             | 19,994 | (0.4) % | 2.0 %  |
| SHANGHAI COMPOSITE | 3,212  | 0.2 %   | 2.4 %  |

**FOREX RATES**

|         | LATEST | % 1D  | % YTD   |
|---------|--------|-------|---------|
| USD/INR | 64.78  | 0.1 % | (3.9) % |
| EUR/USD | 1.14   | 0.4 % | 7.6 %   |
| GBP/USD | 1.30   | 0.2 % | 5.4 %   |
| USD/JPY | 113.78 | 0.8 % | (1.9) % |
| USD/AUD | 1.32   | 0.6 % | (3.5) % |
| USD/SGD | 1.38   | 0.3 % | (3.3) % |

**COMMODITIES**

|                    | LATEST | % 1D    | % YTD    |
|--------------------|--------|---------|----------|
| WTI Crude(USD/bbl) | 45     | (4.1) % | (13.8) % |
| Gold(INR/10g)      | 28,135 | 0.2 %   | 1.2 %    |
| Gold Comex(USD/oz) | 1,226  | (0.1) % | 5.9 %    |
| SILVER(INR/1Kg)    | 37,178 | 0.3 %   | (4.5) %  |
| Aluminium(USD/MT)  | 1,913  | 0.5 %   | 12.4 %   |
| Copper(USD/MT)     | 5,818  | (0.5) % | 4.4 %    |

**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 unexpectedly grew at an accelerated rate in the month of June, the Institute for Supply Management revealed in a report on Thursday. The ISM said its non-manufacturing index rose to 57.4 in June from 56.9 in May. With exports rising and imports falling, the Commerce Department released a report on Thursday showing that the U.S. trade deficit narrowed in the month of May. The report said the trade deficit narrowed to \$46.5 billion in May from \$47.6 billion in April. Employment in the US private sector rose by less than expected in the month of June, according to a report released by payroll processor ADP on Thursday. ADP said private sector employment climbed by 158,000 jobs in June after jumping by a revised 230,000 jobs in May.

**Global Equities:** DOW tumbled amid soaring geopolitical tensions with North Korea and a continued tech sell-off. Markets are now closely eyeing the US nonfarm payrolls data which would be released later on today.

**Indian Economy:** The water storage available in 91 major reservoirs of the country for the week ending on July 06, 2017 was 33.114 BCM, which is 21% of total storage capacity of these reservoirs. This percentage was at 19 for the week ending on June 29, 2017. The level of July 06, 2017 was 118% of the storage of corresponding period of last year and 90% of storage of average of last ten years. The total storage capacity of these 91 reservoirs is 157.799 BCM which is about 62% of the total storage capacity of 253.388 BCM which is estimated to have been created in the country. 37 Reservoirs out of these 91 have hydropower benefit with installed capacity of more than 60 MW.

**Equity Markets:** Key benchmark indices settled with small gains after hovering in positive terrain throughout the session. The Sensex settled at a new high while the Nifty settled at its highest level in a month. However, weakness in global stocks kept gains under check. Key indices rose for the second day in a row. Stocks of public sector banks surged. Stocks of private sector banks were mixed. Most realty stocks rose for the second straight day. Page Industries dropped on profit booking after recent rally triggered by optimism over the government's rollout of goods and services tax from 1 July 2017.

**Corporate News:** Drug firm Jubilant Life Sciences said its subsidiary has received final approval from the US health regulator for Bupropion Hydrochloride extended- release tablets, used for the treatment of major depressive disorder and prevention of seasonal affective disorder. Shares of Mahindra Holidays & Resorts India will remain in focus on Friday, as they turn ex-bonus on Monday. Investors wishing to receive the bonus shares have to buy them by today. Global crude oil prices extended a drop from recent highs on news of a rise in US production and on reports that OPEC output was also on the rise. This could keep local oil linked counters in focus.



## FUND FLOWS

|             | LATEST | MTD    | YTD   |
|-------------|--------|--------|-------|
| FII(USD mm) | 19.3   | (99.3) | 23.5  |
| MF(INR cr)  | 208.0  | 448.8  | 485.2 |

## MARKET TURNOVER

|              | LATEST  | AVG MTD | AVG YTD |
|--------------|---------|---------|---------|
| Cash(INR cr) | 28,604  | 26,105  | 29,267  |
| F&O(INR cr)  | 891,391 | 541,540 | 537,531 |

## MARKET VOLATILITY

|          | LATEST | AVG MTD | AVG YTD |
|----------|--------|---------|---------|
| CBOE VIX | 11.1   | 11.1    | 11.4    |
| NSE VIX  | 11.0   | 11.2    | 11.3    |

## NSE INDICES / SECTORAL PERFORMANCE

|        | LATEST | % 1D    | % YTD   |             | LATEST | % 1D    | % YTD   |
|--------|--------|---------|---------|-------------|--------|---------|---------|
| Banks  | 23,467 | 0.5 %   | 8.9 %   | Energy      | 11,885 | (0.3) % | 0.6 %   |
| IT     | 10,149 | (0.1) % | (4.2) % | Pharma      | 9,598  | 0.1 %   | (8.6) % |
| Metals | 3,094  | 0.4 %   | (0.4) % | Finance     | 9,606  | 0.6 %   | 8.8 %   |
| Auto   | 10,747 | 0.4 %   | 8.3 %   | PSU         | 3,391  | 2.4 %   | (3.8) % |
| FMCG   | 27,582 | 0.8 %   | 16.7 %  | Real Estate | 275    | 1.8 %   | 25.3 %  |

## NSE MOVERS AND SHAKERS

| TOP GAINERS | LATEST | % 1D  | % YTD   | TOP LOSERS | LATEST | % 1D    | % YTD   |
|-------------|--------|-------|---------|------------|--------|---------|---------|
| Punjab Nat  | 143    | 4.9 % | (4.4) % | United Spi | 2,555  | (1.5) % | 24.8 %  |
| Piramal En  | 2,935  | 4.0 % | 51.6 %  | Bajaj Auto | 2,729  | (1.5) % | (2.0) % |
| Bharti Inf  | 415    | 2.9 % | 25.8 %  | H P C L    | 509    | (1.4) % | (1.8) % |
| Rural Elec  | 177    | 2.8 % | (1.5) % | Hind.Zinc  | 266    | (1.4) % | (8.6) % |
| Motherson   | 314    | 2.8 % | 25.5 %  | Eicher Mot | 27,689 | (1.3) % | 8.4 %   |

## EVENTS CALENDAR

| EVENT  | DATE       | TIME(GMT) | REGION | ACTUAL | PREVIOUS VALUE |
|--|------------|-----------|--------|--------|----------------|
| Foreign Reserves (Australian dollar) (JUN)                 | 07-07-2017 | 6:30      | AUD    | -      | -              |
| Full Time Employment Change (JUN)                          | 07-07-2017 | 12:30     | CAD    | -      | 77             |
| Ivey Purchasing Managers Index SA (JUN)                    | 07-07-2017 | 14:00     | CAD    | -      | 53.8           |
| Net Change in Employment (JUN)                             | 07-07-2017 | 12:30     | CAD    | -      | -              |
| Part Time Employment Change (JUN)                          | 07-07-2017 | 12:30     | CAD    | -      | (22.3)         |
| Participation Rate (JUN)                                   | 07-07-2017 | 12:30     | CAD    | -      | 65.8           |
| Unemployment Rate (JUN)                                    | 07-07-2017 | 12:30     | CAD    | -      | 0.066          |
| Foreign Currency Reserves (JUN)                            | 07-07-2017 | 7:00      | CHF    | -      | -              |
| Unemployment Rate (JUN)                                    | 07-07-2017 | 5:45      | CHF    | -      | 0.031          |
| Unemployment Rate s.a. (JUN)                               | 07-07-2017 | 5:45      | CHF    | -      | 0.032          |
| German Industrial Production n.s.a. and w.d.a. (YoY) (MAY) | 07-07-2017 | 6:00      | EUR    | -      | 0.029          |
| German Industrial Production s.a. (MoM) (MAY)              | 07-07-2017 | 6:00      | EUR    | -      | 0.008          |
| Construction Output SA (MoM) (MAY)                         | 07-07-2017 | 8:30      | GBP    | -      | (0.016)        |
| Construction Output SA (YoY) (MAY)                         | 07-07-2017 | 8:30      | GBP    | -      | (0.006)        |
| Halifax House Price (3MoY) (JUN)                           | 07-07-2017 | 7:30      | GBP    | -      | 0.033          |
| Halifax Plc House Prices s.a. (MoM) (JUN)                  | 07-07-2017 | 7:30      | GBP    | -      | 0.004          |
| Industrial Production (MoM) (MAY)                          | 07-07-2017 | 8:30      | GBP    | -      | 0.002          |
| Industrial Production (YoY) (MAY)                          | 07-07-2017 | 8:30      | GBP    | -      | (0.008)        |
| Manufacturing Production (MoM) (MAY)                       | 07-07-2017 | 8:30      | GBP    | -      | 0.002          |
| Manufacturing Production (YoY) (MAY)                       | 07-07-2017 | 8:30      | GBP    | -      | 0              |
| NIESR Gross Domestic Product Estimate (JUN)                | 07-07-2017 | 12:00     | GBP    | -      | 0.002          |
| Total Trade Balance (Pounds) (MAY)                         | 07-07-2017 | 8:30      | GBP    | -      | -              |
| Trade Balance Non EU (Pounds) (MAY)                        | 07-07-2017 | 8:30      | GBP    | -      | -              |
| Visible Trade Balance (Pounds) (MAY)                       | 07-07-2017 | 8:30      | GBP    | -      | -              |
| Coincident Index (MAY P)                                   | 07-07-2017 | 5:00      | JPY    | -      | 117.1          |
| Labor Cash Earnings (YoY) (MAY)                            | 07-07-2017 | 0:00      | JPY    | -      | 0.005          |
| Leading Index (MAY P)                                      | 07-07-2017 | 5:00      | JPY    | -      | 104.2          |
| Real Cash Earnings (YoY) (MAY)                             | 07-07-2017 | 0:00      | JPY    | -      | 0              |
| Advanced Monthly Earnings (MoM) (JUN)                      | 07-07-2017 | 12:30     | USD    | -      | 0.002          |



|   |            |       |     |   |       |
|---|------------|-------|-----|---|-------|
| Average Hourly Earnings (YoY) (JUN)                           | 07-07-2017 | 12:30 | USD | - | 0.025 |
| Average Weekly Hours All Employees (JUN)                      | 07-07-2017 | 12:30 | USD | - | 34.4  |
| Baker Hughes U.S. Rig Count (JUL 07)                          | 07-07-2017 | 17:00 | USD | - | 940   |
| Change in Manufacturing Payrolls (JUN)                        | 07-07-2017 | 12:30 | USD | - | -     |
| Change in Non-farm Payrolls (JUN)                             | 07-07-2017 | 12:30 | USD | - | -     |
| Change in Private Payrolls (JUN)                              | 07-07-2017 | 12:30 | USD | - | -     |
| EIA Natural Gas Storage Change (JUN 30)                       | 07-07-2017 | 14:30 | USD | - | 46    |
| EIA Working Natural Gas Implied Flow (JUN 30)                 | 07-07-2017 | 14:30 | USD | - | 46    |
| Fed releases July 2017 Monetary Policy Report to the Congress | 07-07-2017 | 15:00 | USD | - | -     |
| Labor Force Participation Rate (JUN)                          | 07-07-2017 | 12:30 | USD | - | 0.627 |
| Two-Month Payroll Net Revision (JUN)                          | 07-07-2017 | 12:30 | USD | - | -     |
| Underemployment Rate (JUN)                                    | 07-07-2017 | 12:30 | USD | - | 0.084 |
| Unemployment Rate (JUN)                                       | 07-07-2017 | 12:30 | USD | - | 0.043 |

..... End of Report .....

