



07 Aug.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,066	0.5 %	9.0 %
BSE SENSEX	32,325	0.3 %	8.1 %
CNX BANK	24,827	0.6 %	15.2 %
CNX MIDCAP	18,365	0.3 %	6.0 %
CNX SMALLCAP	7,669	0.1 %	8.4 %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	22,093	0.3 %	11.1 %
S&P 500	2,477	0.2 %	9.7 %
FTSE 100	7,512	0.5 %	4.7 %
HANG SENG	27,563	0.1 %	24.4 %
NIKKEI	19,952	(0.4) %	1.8 %
SHANGHAI COMPOSITE	3,262	(0.3) %	4.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	63.58	(0.2) %	(5.7) %
EUR/USD	1.18	(0.9) %	11.1 %
GBP/USD	1.30	(0.7) %	6.0 %
USD/JPY	110.69	0.5 %	(4.6) %
USD/AUD	1.26	0.4 %	(7.7) %
USD/SGD	1.36	0.2 %	(4.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	50	1.1 %	(5.3) %
Gold(INR/10g)	28,554	0.6 %	2.7 %
Gold Comex(USD/oz)	1,265	(0.7) %	9.3 %
SILVER(INR/1Kg)	37,966	1.3 %	(2.5) %
Aluminium(USD/MT)	1,890	(0.1) %	11.0 %
Copper(USD/MT)	6,330	0.6 %	13.6 %

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 %	(0.2) %

Global Economy: The all-important US nonfarm payrolls showed that employment in the US jumped by much more than expected in the month of July. The report said non-farm payroll employment surged up by 209,000 jobs in July after rising by an upwardly revised 231,000 jobs in June. With the stronger than expected job growth, the unemployment rate edged down to 4.3% in July from 4.4% in June. The modest decrease matched economist estimates. Germany's factory orders grew 1% in June from May, when they increased by a revised 1.1%, data from Destatis showed Friday. They were forecast to grow moderately by 0.5%. Domestic orders grew 5.1%, while foreign bookings declined 2% in June. Demand from the euro area eased 2.4%, and orders from other countries decreased 1.5%. Excluding major orders, manufacturing bookings climbed 2% on month in June.

Global Equities: After the release of better than expected employment data, stocks saw modest strength during trading on Friday. While buying interest was somewhat subdued, the Dow still reached another new record closing high.

Indian Economy: The CII-IBA Financial Conditions Index for Q2 FY 2017-18 recorded a substantial change from 56.9 in the first quarter of FY2017-18 to 71.4 in the current quarter owing to expectation of improvement in the overall financial conditions in the economy. There seems to be substantial optimism across most of the sub-indices leading to improvement in the Financial Conditions Index in this quarter as compared to previous quarter. Among the sub-indices, the cost of Funds Index has recorded the highest level (77.6) followed by Funding Liquidity Index (72), External Financial Linkages Index (68.1) and Economic Activity Index (68.1).

Equity Markets: Trading for the week finished on a positive note as key indices settled with modest gains after a volatile and range bound session of trade as firmness in European stocks perked up sentiment. Nifty settled above the psychologically important 10,000 mark after falling below the mark in intraday trade. Indices snapped two-day losing streak. Caution prevailed in global stocks ahead of US nonfarm payroll data for July, which is due later in the global day.

Commodities: On account of implementation of GST there may be instances where the retail sale price printed on pre-packaged commodity is required to be changed. The Ministry of Consumer Affairs has issued an order according to which, manufacturers/packers/importers of pre-packaged commodities are to declare the revised retail sale price (MRP), by way of stamping or putting sticker or online printing, as the case may be, on the unsold stock. Pharma major Divi's Laboratories, in a BSE filing on Friday informed that the inspection of its unit-II Vishakhapatnam has concluded successfully with no critical observation. The company informed that the unit was inspected by five inspectors from HPR (Ireland) and JAZMP (Slovenia) from July 31, 2017 to August 4, 2017. Local Oil and Gas counters could be in continued focus following strength in oil prices. WTI Crude oil futures edged up and tested two month highs above \$50 per barrel as falling US crude oil inventories and weak US dollar kept the counter supported.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	8.7	(15.4)	25.2
MF(INR cr)	(25.3)	214.6	466.7

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	31,358	29,782	30,312
F&O(INR cr)	447,879	612,024	551,324

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	10.0	10.2	11.1
NSE VIX	11.4	11.7	11.3

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	24,827	0.6 %	15.2 %	Energy	13,204	0.9 %	11.7 %
IT	10,758	0.7 %	1.6 %	Pharma	9,257	(0.9) %	(11.9) %
Metals	3,302	2.5 %	6.3 %	Finance	10,138	0.5 %	14.9 %
Auto	11,138	0.7 %	12.3 %	PSU	3,602	1.4 %	2.2 %
FMCG	25,551	0.3 %	8.1 %	Real Estate	281	0.2 %	28.1 %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Titan Comp	611	9.5 %	33.1 %	Dr Reddy's	2,240	(3.6) %	(18.4) %
H P C L	433	9.0 %	25.1 %	Tata Power	80	(2.9) %	(10.0) %
I O C L	419	8.2 %	9.9 %	Cadila Hea	533	(2.4) %	20.3 %
B P C L	518	5.7 %	21.7 %	Aurobindo	725	(2.2) %	6.2 %
Bajaj Fins	5,308	3.8 %	29.5 %	Glenmark P	689	(1.9) %	(19.6) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
No Data Found					

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