



07 Sep.2017

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	9,916	(0.4) %	7.3 %
BSE SENSEX	31,662	(0.5) %	5.9 %
CNX BANK	24,279	(0.2) %	12.7 %
CNX MIDCAP	18,563	0.0 %	7.1 %
CNX SMALLCAP	7,904	0.4 %	11.8 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	21,808	0.3 %	9.7 %
S&P 500	2,466	0.3 %	9.2 %
FTSE 100	7,354	(0.3) %	2.5 %
HANG SENG	27,614	(0.5) %	24.7 %
NIKKEI	19,358	(0.1) %	(1.2) %
SHANGHAI COMPOSITE	3,385	0.0 %	8.0 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.11	0.1 %	(4.9) %
EUR/USD	1.19	0.2 %	12.5 %
GBP/USD	1.30	0.9 %	6.1 %
USD/JPY	109.08	(0.4) %	(6.0) %
USD/AUD	1.25	(0.1) %	(8.5) %
USD/SGD	1.35	(0.5) %	(5.7) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	49	2.9 %	(7.0) %
Gold(INR/10g)	30,205	0.2 %	8.6 %
Gold Comex(USD/oz)	1,344	0.2 %	16.2 %
SILVER(INR/1Kg)	40,711	(0.0) %	4.6 %
Aluminium(USD/MT)	2,082	(0.6) %	22.3 %
Copper(USD/MT)	6,904	0.5 %	23.9 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec India	8.0	0.0 %	(0.2) %
10 Y GSec US 10	2.1	(0.1) %	(0.4) %

Global Economy: After reporting a slowdown in the pace of growth in US service sector activity in the previous month, the Institute for Supply Management (ISM) released a report on Wednesday showing a rebound in the pace of growth in the month of August. The ISM said its non-manufacturing index climbed to 55.3 in August after falling to 53.9 in July. The Federal Reserve in its Beige Book noted concerns about a prolonged slowdown in the auto industry and said it was too soon to gauge the impact of Hurricane Harvey on the broader economy. Without offering specifics, the Beige Book said Hurricane Harvey "created broad disruptions to economic activity along the Gulf Coast in the Dallas and Atlanta Districts." Still, the economy expanded at a modest to moderate pace in the past few months. Employment growth slowed some on balance, ranging from a slight to a modest rate in most Districts. Labor markets were widely characterized as tight. There were reports of worker shortages in numerous industries, most notably in manufacturing and construction.

Global Equities: A modest pick up in buying was seen in US stocks after the intense selling in the previous session as recovery in service sector activity helped.

Indian Economy: In his weekly review meeting with senior officials of Ministry of Steel in New Delhi, the Union Minister of Steel Birender Singh, tasked the Ministry officials to play active role in transforming and turning around Steel PSUs. Senior Ministry officials will be given responsibility of monitoring the performance of individual steel plants by on-ground visits and reviews, he added. These officials will check the progress of each plant in terms of achievements of the targets set out for them.

Equity Markets: Local stocks registered modest losses in line with drop in global peers as rising geopolitical tensions between the US and North Korea dampened sentiment. The Sensex hit lowest closing level in a week. ITC and Sun Pharmaceutical Industries witnessed selling. Domestic stocks saw a gap-down opening on negative Asian stocks. Indices trimmed losses in afternoon trade after hovering in a narrow range in negative zone amid weakness in European stocks.

Corporate News: IT major Wipro announced that it has won a five-year IT applications management contract from Outokumpu, a global leader in stainless steel, headquartered in Finland. As part of the five-year contract, Wipro will provide applications management services for Outokumpu's SAP landscape along with legacy applications support to cover Outokumpu locations, globally. Infosys announced the opening of a new state-of-the-art office space in Amsterdam. The company currently has more than 20 clients in the country and employs over 1,100 people including those working at client locations in The Netherlands. Reliance Industries (RIL) said that it had participated in an on-line e-bidding process held recently by Allahabad Bank being leader of the consortium of eleven banks to sell/dispose off assets of Kemrock Industries & Exports of Vadodara, Gujarat and has been declared as the winner in the bid.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(35.3)	(94.7)	(0.8)
MF(INR cr)	384.9	387.2	569.7

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	30,171	28,999	30,249
F&O(INR cr)	532,514	428,380	573,967

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	12.2	10.8	11.3
NSE VIX	13.1	12.7	11.7

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	24,279	(0.2) %	12.7 %	Energy	13,292	0.1 %	12.5 %
IT	10,422	(0.7) %	(1.6) %	Pharma	8,897	(1.6) %	(15.3) %
Metals	3,605	0.7 %	16.1 %	Finance	10,078	0.1 %	14.2 %
Auto	10,746	(0.2) %	8.3 %	PSU	3,251	(1.0) %	(7.8) %
FMCG	25,473	(1.3) %	7.8 %	Real Estate	287	0.1 %	31.0 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Bajaj Fin.	1,859	3.6 %	57.3 %	Sun Pharma	474	(3.6) %	(31.5) %
Motherson	326	3.4 %	30.3 %	Divi's Lab	699	(3.5) %	11.4 %
Container	1,387	2.7 %	37.1 %	Idea Cellu	82	(3.4) %	(3.9) %
JSW Steel	263	2.7 %	39.3 %	Punjab Nat	139	(3.2) %	(7.3) %
Indiabulls	1,264	1.9 %	27.0 %	Godrej Con	900	(3.1) %	6.2 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
Foreign Reserves (Australian dollar) (AUG)	07-09-2017	06:30	AUD	-	-
Retail Sales s.a. (MoM) (JUL)	07-09-2017	01:30	AUD	-	0.003
Trade Balance (Australian dollar) (JUL)	07-09-2017	01:30	AUD	-	-
Building Permits (MoM) (JUL)	07-09-2017	12:30	CAD	-	0.025
Ivey Purchasing Managers Index SA (AUG)	07-09-2017	14:00	CAD	-	60
Foreign Currency Reserves (AUG)	07-09-2017	07:00	CHF	-	-
ECB Asset Purchase Target (SEP)	07-09-2017	11:45	EUR	-	-
ECB Deposit Facility Rate (SEP 07)	07-09-2017	11:45	EUR	-	(0.004)
ECB Marginal Lending Facility (SEP 07)	07-09-2017	11:45	EUR	-	0.0025
European Central Bank Rate Decision (SEP 07)	07-09-2017	11:45	EUR	-	0
Euro-Zone Government Expenditure (QoQ) (2Q)	07-09-2017	09:00	EUR	-	0.004
Euro-Zone Gross Domestic Product s.a. (QoQ) (2Q F)	07-09-2017	09:00	EUR	-	0.006
Euro-Zone Gross Domestic Product s.a. (YoY) (2Q F)	07-09-2017	09:00	EUR	-	0.022
Euro-Zone Gross Fixed Capital (QoQ) (2Q)	07-09-2017	09:00	EUR	-	0.013
Euro-Zone Household Consumption (QoQ) (2Q)	07-09-2017	09:00	EUR	-	0.003
German Industrial Production n.s.a. and w.d.a. (YoY) (JUL)	07-09-2017	06:00	EUR	-	0.024
German Industrial Production s.a. (MoM) (JUL)	07-09-2017	06:00	EUR	-	(0.011)
Halifax House Price (3MoY) (AUG)	07-09-2017	07:30	GBP	-	0.021
Halifax Plc House Prices s.a. (MoM) (AUG)	07-09-2017	07:30	GBP	-	0.004
Adjusted Current Account Total (Yen) (JUL)	07-09-2017	23:50	JPY	-	-
Bank Lending Banks ex-Trust (AUG)	07-09-2017	23:50	JPY	-	0.034
Bank Lending incl Trusts (YoY) (AUG)	07-09-2017	23:50	JPY	-	0.033
Coincident Index (JUL P)	07-09-2017	05:00	JPY	-	117.1
Current Account Total (Yen) (JUL)	07-09-2017	23:50	JPY	-	-
GDP Business Spending (QoQ) (2Q F)	07-09-2017	23:50	JPY	-	0.024
GDP Private Consumption (QoQ) (2Q F)	07-09-2017	23:50	JPY	-	0.009
Gross Domestic Product (QoQ) (2Q F)	07-09-2017	23:50	JPY	-	0.01
Gross Domestic Product Annualized (2Q F)	07-09-2017	23:50	JPY	-	0.04
Gross Domestic Product Deflator (YoY) (2Q F)	07-09-2017	23:50	JPY	-	(0.004)



Leading Index (JUL P)	07-09-2017	05:00	JPY	-	105.9
Nominal Gross Domestic Product (QoQ) (2Q F)	07-09-2017	23:50	JPY	-	0.011
Tokyo Avg Office Vacancies (AUG)	07-09-2017	02:00	JPY	-	3.22
Trade Balance - BOP Basis (Yen) (JUL)	07-09-2017	23:50	JPY	-	-
Manufacturing Activity (2Q)	07-09-2017	22:45	NZD	-	0.028
Mfg Activity Volume (QoQ) (2Q)	07-09-2017	22:45	NZD	-	(0.003)
Continuing Claims (AUG 26)	07-09-2017	12:30	USD	-	-
DOE Cushing OK Crude Inventory (SEP 01)	07-09-2017	15:00	USD	-	-
DOE U.S. Crude Oil Inventories (SEP 01)	07-09-2017	15:00	USD	-	-
DOE U.S. Distillate Inventory (SEP 01)	07-09-2017	15:00	USD	-	-
DOE U.S. Gasoline Inventories (SEP 01)	07-09-2017	15:00	USD	-	-
EIA Natural Gas Storage Change (SEP 01)	07-09-2017	14:30	USD	-	30
EIA Working Natural Gas Implied Flow (SEP 01)	07-09-2017	14:30	USD	-	30
Fed's Dudley Speaks on U.S. Economic Outlook, Monetary Policy	07-09-2017	23:00	USD	-	-
Fed's Mester Speaks on Economic Outlook and Monetary Policy	07-09-2017	16:15	USD	-	-
Initial Jobless Claims (SEP 02)	07-09-2017	12:30	USD	-	-
Non-Farm Productivity (2Q F)	07-09-2017	12:30	USD	-	0.009
Unit Labor Costs (2Q F)	07-09-2017	12:30	USD	-	0.006

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